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ABSTRACT

This conference program describes "education and training agencies taking a leading role in promoting innovation on a regional basis" as the focus of the Agora and puts forward the following three key issues to be debated during it: (1) the concept of the learning region itself and a critique of its strengths and weaknesses; (2) education and training agencies, including universities, as facilitators of innovation on a regional basis; and (3) education and training agencies supporting economic and social cohesion in building the social economy. Papers presented at the Agora are as follows: "Regional Development Networks in Europe" (Stahl); "Advantages and Drawbacks of the 'Learning Region' Approach" (Richard); "Constructing Learning Regions: Contributions from Social Research" (Gustavsen); "Local Partnerships in Ireland" (Crooks); "ICT Supported Innovation in Regional Training Systems" (Dondi); "South-East Europe and the Learning Region" (Baumgartl); "Bulgarian Context and Emerging Initiatives" (Pantaleev); "Developing a Local Response to the Needs of Vocational Training" (Courbebaisse); "The European Social Economy from a Welfare Regime Perspective and the Linkage to New Social Partnerships and Learning Regions" (Westphalen); "Learn While Working, Work While Learning" (Grucker); "Learning Region as an Alternative for Enhancing the Economic and Social Dimension in Tourist Areas. Some Reflections" (Mol,s Mol,s); "Summary of Discussions: Promoting the Learning Region Education and Training Agencies Taking a Leading Role in Promoting Innovation on a Regional Basis" (Nyhan). Includes an agenda and a list of participants. Most articles include references. (MO)

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PANORAMA

AGORA XI
The learning region

Thessaloniki, 15 to 16 March 2001

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The learning region

Thessaloniki,
15 to 16 March 2001

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Foreword

Education and training agencies taking a leading role in promoting innovation on a regional basis

Introduction

This Agora will take place at Cedefop in Thessaloniki from 15 to16 March 2001.

In this note the concept of the learning region is firstly briefly outlined. Secondly, the manner in which this theme is being dealt with in the wider context of the Cedefop Research Arena (Cedra) is outlined. Thirdly, the thinking underlying the Cedefop Agoras, three of which are held every year, is put forward. Finally, a draft outline of the Agora XI programme, which deals with the learning region, is put forward.

The concept of the learning region

Despite the emphasis on globalisation and the prediction of the demise of place and distance, due in part to advances in internet technologies, the region or locality is continuing to assert itself as a focal point for the renewal and sustenance of social and economic life. In the context of European Union (EU) policy to promote economic and social cohesion, the actions undertaken at a regional level, for example, have been very successful. Due to their smaller scale, regions can better coordinate their planning efforts and be more flexible than larger national entities in coming up with new solutions to address everyday problems. The possibility of close personal contacts along with a feeling of communal identity and a shared history can generate commitment to work hard on a local level, building what is termed 'social capital', which is not always the case on a national level.

But, this is not to exaggerate the advantages of regions nor oversimplify the task of promoting economic and social advancement. Regions and localities can indeed be inward looking and conservative. Power within regions can also be held by cliques which manipulate affairs for their own purposes and resist necessary national-level reforms. Also, some economically well-off regions can be isolationalist, thinking only of their self-interests and not taking responsibility for broader national social and economic issues or engage with those outside of their own boundaries. However, even within regions which are open to innovation, progress can only take place if there are forward looking institutions and individuals who take the lead in coming up with ideas and facilitating cooperation between all of the actors throughout a region, thus raising the question of what education and training agencies can do in this regard.

The word 'region' in the term 'learning region' should be interpreted in a much wider sense than that of a statutory or legally defined region. In very many cases learning regions may

refer to small scale communities, localities, towns or villages involved in collaborative learning activities. The important feature is that development is a collective process to produce an outcome that is in the interest of all concerned and in which top-down and bottom-up developments form a dialectic. Successful partnerships, therefore, reflect local circumstances, are not imposed and do not follow a standard model.

In the concept of the learning region being put forward here, the focus is on achieving social and economic objectives in an integrated manner. Regional learning initiatives entail empowering local communities (through the involvement of people from different interest groups) to enhance their living standards and quality of life, both from economic and social points of view.

The word 'learning' in the term 'learning region' of course raises the question of the role of education and training agencies in the promotion of learning in a regional context and how they might act as catalysts or as active partners with others in this respect. In the first place, the concept of learning in a regional context needs to be clarified. Traditionally, education and training establishments see their main role as being providers of teaching and training (learning) to individuals who, on graduation join other bodies (enterprises, public or community agencies, etc.) to utilise their learning. This can be referred to as a linear way of thinking about learning and is typical of formal learning in initial education and training. Another way of looking at the learning process, which is not so prevalent, but is at the heart of the thinking about the learning region, is that which can be called interactive learning. This refers to social and organisational learning that arises in the course of cooperation between different bodies and interest groups – technological and social research/development agencies, educational institutes, companies, social partners, community bodies (civil society) – working together in project teams or in dynamic networks to achieve a common goal. In line with this model, learning gives rise to a community way of behaving and know-how. It is this type of cooperative learning, much of it informal and project based (often addressing specific problems), rather than the formal type of learning described above that is at the heart of the 'learning region' concept.

From an educational and training point of view the two goals of learning, mentioned above, that is the individual formal learning activities and the social/organisational informal ones, need to be kept in balance. The 'learning region' concept, however, has more to do with the social/organisational pole of the axis. The emphasis, therefore, is primarily on introducing new social learning methodologies.

This entails:

(a) identifying new roles to be played by existing education and training agencies; and/or

(b) creating new agencies for the promotion of this kind of learning.

Cedefop's interest in the concept of the learning region

In early 2000 Cedefop published a book entitled *Towards the learning region – Education and regional innovation in the European Union and the United States* as a contribution towards the stimulation of debate on this topic.

Around the same time Cedefop commissioned the Department of Work Sciences of Halmstad University in Sweden to produce an analysis of international research on 'regional approaches to learning in the field of vocational education and training'. A final version of this report is now available.

Beginning in 2001, Cedefop, in the context of the Cedefop Research Arena (Cedra), intends to launch a concerted series of activities (including the creation and moderation of knowledge sharing networks, development of research resource materials (including case studies) around the topic of the learning region. Cedefop wishes to carry out these activities in partnership with (or as part of development coalitions) with other research and development bodies who are interested in examining this concept and promoting actions at a European level.

One of the main Cedefop activities to take place in 2001 is the holding of an *Agora Thessaloniki* on this topic.

The Agora Thessaloniki project

The Agora Thessaloniki project was established by Cedefop in 1997. The purpose of an Agora, three of which take place in Thessaloniki every year, is to provide a space for researchers to engage in debate with political/government representatives and social partners about a current topic.

The starting point for an Agora is the results of research on a specific topic which are then discussed in a structured way with the above mentioned people.

To date, ten Agoras have taken place dealing with topics such as: the role of enterprises in lifelong learning; addressing the issue of lowly skilled people; reporting on Human Capital.

Agora XI dealing with the learning region is to be jointly organised by the Cedra and Agora teams.

Proposed issues to be debated at Agora XI 'Promoting the learning region – education and training agencies taking a leading role in promoting innovation on a regional basis'

The following three issues are put forward as key ones to be debated at the Agora:

(a) concept of the learning region itself and a critique of its strengths and weaknesses including an examination of:

  (i) issues of centralisation and decentralisation with regard to fostering innovation by educational agencies (including research and development bodies);

  (ii) relationship between the statutory (regulated) interventions in providing a framework for learning region initiatives and the more bottom-up (community-led partnership/ network or market-driven) strategies;

(b) education and training agencies (including universities) as facilitators of innovation on a regional basis

  (i) examination of case studies of regional innovations having a significant educational input;

  (ii) profiles of new regional oriented agencies (which have various names such as 'regional learning centres') integrating research and development and education and training activities;

  (iii) examination of methodologies used;

(c) education and training agencies supporting economic and social cohesion in building the social economy

  (i) regional models for an integrated focus on economic and social goals;

  (ii) examination of successful partnerships between public, private and non-governmental organisations.

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Agenda of the meeting

Thursday, 15 March 2001

09.00 Opening presentation – Johan van Rens, Director Cedefop

09.10 Issues to be discussed at this Agora – Barry Nyhan, Cedefop

09.20 General introduction: structure of the dialogue – Éric Fries Guggenheim, Cedefop

Session I The concept of the learning region and a critique of its strengths and weaknesses

9.30 Introduction: What is a learning region? Thomas Stahl, ISOB, Regensburg (Germany)

9.50 Advantages and disadvantages of the 'learning region' approach, Antoine Richard – French research centre for the analysis of occupation, vocational education and training – CEREQ (France)

10.10 Discussion

11.00 Round table discussion of the VET actors: initial reactions of social partners

- Bley Nikolaus DGB-Bildungswerk Nordrhein-Westfalen (Germany)
- Johan Stålhammar, Ministry of Education (Sweden)
- Edward Tersmette, Directorate General for Education and Culture (European Commission)

11.45 Discussion

Session II Education and training agencies (including universities) as facilitators of innovation on a local level

14.00 Introduction to issue – Collaborative learning for innovation at a regional/local level, Björn Gustavsen, National Institute for Working Life, Stockholm (Sweden)

14.20 Three case studies

- Irish experiences – Education and training dimension of Area Development Management programme, Tony Crooks
- A Swedish experience, Bernd Hofmaier (Sweden)
- ICT as an educational resource for local/regional development, Claudio Dondi, Scienter, Bologna (Italy)

15.20 Discussion

16.15 Three further case studies

- A Balkan experience, Bernd Baumgartl (Austria)
- A Bulgarian experience, Pantaleev Tzako Georgiev, Director of Human Resource, Human Resource Development Centre – HRDC (Bulgaria)
- A French experience, Pierre Courbebaisse, General Director of Association for Continuing Education and Training – AFEC (France)

17.15 Discussion

Friday, 16 March 2001

Session III Education and training and the social economy in a regional context

09.00 Introduction: European perspectives on the social economy, Sven-Åge Westphalen, Copenhagen Centre (Denmark)

09.20 Two further case studies

- A Portuguese perspective, Eduardo Figueira (Portugal)
- Case study from Alsace, Sylvie Grucker (France): learning while working – working while learning

10.00 Discussion

11.00 Round table discussion: 'summing up' comments by Bernd Hofmaier, followed by responses of two representatives of the VET actors

- Vangelis Intzidis, consultant, Secretariat-General for Adult Education, Ministry of Education and Religious Affairs (Greece)
- Vicente J. Molés, Representative of the Enterprise Directorate-General of the European Commission

11.40 Discussion

12.50 Concluding remarks, Barry Nyhan (Cedefop)

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1. Regional development networks in Europe

Thomas Stahl

1.1. Towards the learning region

The concept of the learning region ([1]), similar to that of the learning company ([2]), proposes that the potentials of all regional actors are to be mobilised and used to initiate local development bottom up, self-organised and self-responsible.

The learning processes of the entrepreneurs involved, their staff and managers as well as the directors and staff of regional institutions with differing functions, not to forget of the unemployed and the socially underprivileged lead to developmental processes of new regional campaigns, cooperations and networks. ([3])

As in the new company forms, these self-organised developmental processes call for the highest degree of flexibility answering the rapid changes of the markets. They express the promise of an adequacy of all measures in relation to the specific features of a region; the promise of acceleration in developmental dynamics by mobilising and effecting a positive feedback of all regional potentials in creativity.

([1]) Stahl, Thomas; Schreiber, R. *Auf dem Weg zur Lernenden Region: eine vergleichende Studie ausgewählter europäischer Regionen im Hinblick auf neue Möglichkeiten zur Bewältigung des industriellen Wandels*. Berlin: 1994

Stahl, Thomas Vocational training, employment and the labor market: a regional approach to structural improvement in Europe. In Bergeran, P.O.; Gaiffe, M.A. (eds). *Croissance, compétitivité, emploi*. Brussels: 1994, p. 245-263.

Stahl, Thomas. Verso la learning region: un approccio regionale al miglioramento strutturale in Europa. In *Apprendimento continuo e formazione*. Milano: ISFOL, 1996, p. 91-105.

([2]) See for example:

Senge, P. *The fifth discipline*. New York: Doubleday, 1990.

Senge, P. The leader's new work: building learning organisations. *Sloan management review*, 1990, fall issue, p. 7-23.

Stahl, Thomas; Nyhan, Barry; d'Aloja, P. *The learning organisation*. Brussels: Eurotecnet, 1993.

Womack, J. P.; Jones, D. T.; Ross, D. *The machine that changed the world*. New York: Harper-Collins, 1990.

([3]) See for example the concept of 'Innovation Consultants' being part of the ADAPT-project 'Learning region Bitterfeld'

Abicht, L. Training innovation consultants as part of the development of a learning region. In *Lernende Region: Kooperationen zur Verbindung von Bildung und Beschäftigung in Europa. Berlin:* Friedrichsdorfer Büro für Bildungsplanung, 1994, p. 235.

Primarily, this effects the mobilisation and targeted development of small and medium-sized enterprises (SMEs) as the potential for economic growth and for an upward trend in employment.

The improvement of the strategic and organisational efficiency in the fields of action listed aims at direct employment effects from the economic reinforcement of the small and medium sized enterprises, as well as indirect employment effects which can result from the specific communicative structures of networks; parallel to the familiar indirect repercussions, such as additional workplaces with service producers and suppliers, it is true to say that with the new establishment of SMEs, a pilot function can be emanated. They set an example for other creative actors in the region, to launch their innovative capabilities productively. Because of their success, they help to broaden the attitude of funding institutions to give assistance to other projects and to generally upgrade the acceptance rating of new solutions with the customers. Such chain reactions caused by spin-off processes were illustrated by the example of Silicon Vally and make for a very definite stepping stone in the direction of the self-perpetuating momentum, which can also be described as the snow ball effect. ([4])

The means and at the same time the living element of the learning region to set off these developments are the new forms of cooperative processes between the companies involved and service institutions which are based on complementary interests, yet which in terms of developmental dynamics, reach far beyond these individual interests. The structural result is the stable and yet flexible interlinkage of regional activities and actors which have their starting point in the individual professional learning processes of those involved. ([5])

It thus becomes clear that learning processes are actually the central drive of the learning region. Just as with the learning company, it is the learning of the individuals in the companies and in the external service institutions who cooperate with the company. The learning of the manager, the staff member, the consultant and trainer of the sponsoring bodies, the college or university staff, the bank employee, etc., all propagate important structural developmental processes, which as concept of organisational learning, alter the regional institutions just as much as the regional links of cooperation and networks between the institutions. The creation and permanent adjustment of regional forms of cooperation to inner and outer necessities are the outcome of organisational learning processes.

([4]) See Camagni, R. *Innovation networks: spatial perspectives.* London: Belhaven Press, 1991.

([5]) See Granovetter, M. Threshold models of collective behaviour. *American journal of sociology,* 1978, Vol. 83, p. 1420-1443.

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An important aspect to be seen here is the feedback provided via the communicative network structures which work as indirect reinforcement and let the network become an incubator organisation for innovation strategies. Generally, the systematic assessment of activities installed in the circle of cooperation can lead to greater self-organised learning processes of all those involved, which correspond in their outcome to the model idea of a learning region. In other words, a variety of actors, relating one to the other, organises and implements innovative projects and promotional measures, checks the results and has the assessments of them flow into the further moulding of instruments. The pinpointing and implementation of strategies of regional business policy is thus already organised as a permanent self-reflexive learning process. ([6])

In this point, the network is totally different from the procedure of the central state control and planning and proves to be a bottom-up-development concept based on self-organisation, in particular relating to the economic actors in the framework of an open 'service for all' structure. ([7])

An improved application and the effective use of all regional resources, existing promotion programs, etc., for integrated solutions specific to the regions for business development is to be the outcome of this attempt. The basic idea lies in the activation of an innovative potential by means of coordinated requirements, complementary, parallel or identical interests and performance structures of SMEs, large firms, external consultants, continuing education, sponsoring bodies, suppliers of technical services, business promotion bodies, etc. This potential is ultimately of benefit in the augmented entirety of its effects on the attraction and efficiency of the region to all parties involved – not to mention the direct beneficial effect.

The local model is hence of such significance because it comprises the direct essence of communication and the calculability, in other words the manageability of the interactions and dependencies. Effective self-responsible networks must address clearly defined problem structures which they really can influence by face to face agreements, the outcome of which is visible and can be measured.

The concept of local institutions is very much based on the conviction that sustainable systems of market economy are not the result of an onedimensional interaction of atomistic competitors. To ensure the survival of European economies and societies we need the complementary revival of social values that enable successful partnerships and motivating work relations.

([6]) See the interlinking processes of learning and development at the learning region in Chemnitz. (ADAPT-project)

See also: Ratti, R. Small and medium-sized enterprises, local synergies and spatial cycles of innovation. In Camagni, R. (ed). *Innovation networks: spatial perspectives.* London: Belhaven Press, 1991.

([7]) The UK institutional approach with TEC's (Training and Enterprises Councils) represents a mixture of top-down and bottom-up development elements in regional settings. They already cover some aspects of the 'learning region' approach.

See for example the GWENT TEC, being part of an ADAPT project (Stahl, Thomas; Schreiber, R. *Auf dem Weg zur Lernenden Region.* Berlin: 1994, p. 131ff.)

Common values, complementary interests and even solidarity seem to be a more promising basis to solve actual economic and social problems in Europe than utilitaristic and individualistic models of thinking and acting.

Thus the scientific discussion of restructuring economy and organising labour-market policies very often is referring to networking, based on shared values and common interests. The Community arguments are becoming popular in that reference system. ([8])

1.2. Creating innovativeness inter-organisational

Apart and complementary to the intra-organisational discussion on systematic improvement of innovativeness by using all possible sources of creativity, the idea and practical experiences with networks and partnerships between organisations becomes an important segment in innovation theory.

As far as innovations and innovativeness is concerned, networking and partnership is systematically introduced to exploit creativity that results out of confrontation of different points of view, different interests and different abilities, knowledge and culture. Examples are transnational partnerships between enterprises or institutions. Partnerships between providers of industrial services and industry, research-industry partnerships, etc.

Of peculiar interest is the discussion and development of local innovation networks. The fruitful work of Gremi ([9]) points out that the classical advantages of local networks, namely reduction of transaction costs and the Marshallian presence of external economics (reducing disadvantage of SMEs by common institutions + mutual help), are complemented in local innovation networks by two additional elements:

(a) ... on the positive side, the collective learning processes that enhance the local creativity, the capability of product innovation (mainly incremental but sometimes even radical innovation) and of technological creation (mainly through a creative adaptation of leading-edge pieces of technology to the needs of local productions); the concept of synergy may be regarded as the most effective to synthesise this process of focalisation of local potential energies;

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(8) Taylor, Charles. *Negative Freiheit? Zur Kritik des neuzeitlichen Individualismus.* Frankfurt: Suhrkamp, 1992, p. 118.
MacIntyre, Alasdair. *Der Verlust der Tugend: zur moralischen Krise der Gegenwart.* Frankfurt: Surhkamp, 1987, p. 13. Original: After Virtue. A Study in Moral Theory, 1985.
Etzioni, A. *The moral dimension: toward a new economics.* New York: Free Press, 1988; p. 239.
Reese-Schäfer, W. *Was ist Kommunitarismus?* Frankfurt: Campus, p. 12.
Miller, D.; Walzer, M. *Pluralism, justice, and equality.* Oxford: Oxford University Press, 1995.

([9]) See Camagni, R. *Innovation networks: spatial perspectives.* London: Belhaven Press, 1991.

(b) on the negative side, the processes of reduction of the elements of dynamic uncertainty that are intrinsic in technological development and innovative processes. In this sense the local milieu works as an uncertainty reducing device, allowing a better understanding of the possible outcomes of the firm's decisions, on easier transcoding of technological information, a faster control over other firm's strategies. ([10])

In all of this an innovative milieu may be defined as a set, or the complex network of mainly informal social relationships on a limited geographical area, often determining a specific external image and a specific internal representation and sense of belonging, which enhances the local innovative capability through synergetic and collective learning processes.

The concept of the learning region clearly would support the addressed innovativeness of such structures and would additionally exploit other segments of local social life (labour markets, social and environmental problems, cultural revivals, etc.) to widen the scope of innovation in a holistic approach.

Nevertheless, all of the quoted examples of innovativeness (e.g. new work organisation, partnerships and networks) show one common feature. It is the productive confrontation of different reference systems (management vs. employees, enterprise vs. enterprise, different traditions of thinking, etc.) that promise innovativeness. In other words, to foster innovativeness in structures and individuals we have to open up fences, allow different and even contradictory references in and render confrontation into co-production of common solutions. A concept of systematically installing innovativeness into our economic and social culture has to exploit the potential of confronting different reference systems fully, by opening up interfaces between these systems making them:

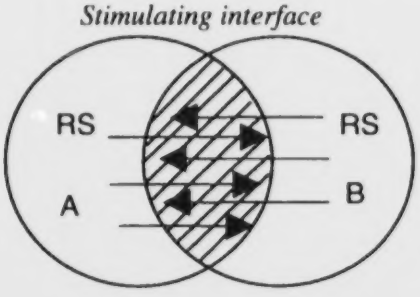
(a) multidimensional;

(b) multilateral;

(c) non-directive;

(d) open to a whole range of consequences.

Innovativeness is fostered by a common space of co-production. This interface knows no predefined functions but allows an open exchange of interests, beliefs, values, knowledge, materials, etc.



([10]) See Camagni, R. *Innovation networks: spatial perspectives.* London: Belhaven Press, 1991, p. 3.

1.3. Networks and interfaces of innovativeness

Horizontal networking inside and between organisations is one of the terms, describing a new quality of cooperation beyond hierarchical systems of order and control and also beyond neo-liberalistic ideologies of competition as the only way of relations in market economy.

Horizontal networks following rather abstract definitions, are subsuming a whole range of different cooperative relations in reality.

The relation of autonomous work-groups under the common roof of an enterprise may be called horizontal networking as well as the contractual regulated relation between an enterprise and its subcontractors or a partnership of some SMEs cooperating in HRD and training without any contractual arrangements.

Characteristic for all of these different ways of organisational networking is a cooperation of actors or action units based on common interest, multilateral trust, direct self-control and assessment and high flexibility of network relations. Along the lines of functionality, effectiveness and efficiency, networks are constantly assessed by all partners. Partners are joining, leaving and joining again without formal restrictions.

Of course the specific forms of these networks are dealing with specific problems and have to overcome varying difficulties. Horizontal networking inside of enterprises for example has to find a way of navigating the different groups along the lines of enterprise tasks in all of their autonomy, cooperating with each other. Networks of SMEs in the training field have to overcome competition and mistrust to find common ways of HRD, etc.

In a framework of governmental deregulation activities all over Europe there is specific emphasis on public-private-partnerships, organised in horizontal networks. Again this model bears enormous potentials in terms of flexibility and innovativeness. On the other hand we are facing specific problems of the side of classic bureaucracies to develop non-directive, open relationships to private organisations, etc.

In terms of innovation and innovativeness these new networking activities inside and between organisations provide a fertile ground to establish systematic interfaces for innovation.

It is the principal openness of these networks in relation to interests, needs and potentials of the different partners and the absence of fixed preconditions or rules that gives way to create new relations, new ways of co-production and new products or services out of partnership networks.

In an abstract way those networks can be categorised in nets:

(a) comprising reference systems with similar backgrounds (e.g. SME networks, sectoral nets of enterprises, quality networks of training providers, etc.)

(b) comprising reference systems with different backgrounds (e.g. private/public partnerships, university/enterprise partnerships, etc.)

(c) mixed networks, comprising similar and different references (e.g. SME nets comprising industrial services, sectoral enterprise nets comprising research institutions, etc.)

The network patterns of the 'learning region' approach allow the highest degree of multilateral openness and are aiming at a mixture of all kinds of partnerships because they are based at the neutral ground of common locality, including all sorts of interests, backgrounds, potentials and problems of local reference systems.

This approach seems to be promising in terms of maximising the amount and optimising quality of innovating interfaces.

1.4. Maximising interfaces to co-produce innovative solutions in modernising economy and improving employment: the learning region

As stated above the 'learning region' concept systematically is using complementary interests, complementary competencies and infrastructures of local actors to increase and exploit bottom-up development potentials of enterprises, institutions, administrations and human beings by way of partnerships and networks.

Not denying all of the economising and rationalising potentials that are available when SMEs and other local actors are cooperating at local level, the following pages will focus mainly at innovativeness, that local and regional networks may create.

1.4.1. Different starting points, similar structures, common objectives

Analysing pilot projects and other experiences in local networking it becomes obvious, that there is a variety of motivation, needs or demands, interests and backgrounds of local actors that may lead to the idea and to first steps of cooperation networks that deserve the name of 'learning region' approach.

We find networks of socially-motivated initiatives of funded labour (second/first labour market), trying to create artificial jobs for long-term unemployed. We find networks of enterprises for specific common activities (e.g. marketing, quality control, training). We find networks of farmers and associated agricultural production trying to improve marketing, common machinery or even alternative (green) farming.

These are just examples for many other local networking initiatives. Looking in more detail at these different approaches it becomes quite clear, that even within one approach the initial activity is generated by different actors. It may be an active farmer, committed to green – farming who initiates a network of other farmers and customers to produce and market food without chemicals. It may be a training provider creating a net of SMEs to deliver HRD more effective and efficient. It may be local labour-market service inviting local entrepreneurs for regular

meetings to create better job opportunities for unemployed and to focus training at actual demands.

In all of these different generating positions of local networking there are similarities of structures and processes, that are characteristic for the 'learning region' approach:

(a) Bottom-up initiative

Initial action is taken by practical actors who want to improve their own activities by the way of cooperation, partnership and networks. It is not traditional governmental policies that are defining direction, structure and process of an intervention, but it is self-responsible action, resulting from an actual need that results in structures and processes constructed by participating actors themselves. The principles of action are very similar: defining a common need and co-producing a solution is done by the same actors.

(b) Partnership and networking

Co-production of common solutions is organised by way of partnership relations, transcending competition and bureaucratic control mechanisms. Multilateral trust, solidarity, direct personal involvement and control are main mechanisms of network organisations. If contractual solutions are involved, regulations are simple, fair and easy to change by common agreement.

(c) Locality

The most general basis for networking and partnership is the principle of common local basis of the activities. Actors know each other, have common environments, do understand local peculiarities, are living face to face to their co-producing partners and are confronted daily with their common solutions. Locality seems to be a rather weak tie for diverging interests but because of its neutral character provides a broad basis for cooperation and networking within and between different references.

(d) Flexibility

As network construction is based on actual needs, interests and potentials of practical actors, structures and processes of networks are changing with the change of needs, interests and potentials. Even the existence of networks is depending on actors need perception, networks emerge, vanish and may be revived again.

Objectives of the 'learning region' approach are the objectives of the actors involved, and insofar there is a variety of objectives visible in different existing approaches. On the other hand, initiated by all of the different groups of actors and their respective motivation a common objective is emerging as a result of the 'learning region' approach: reduction of social segmentation of local and territorial level or more positively: the recreation of common interest as a result of holistic processes of local co-production by all thinkable reference groups. In this sense the Community philosophy may be reinforced by the 'learning region' approach.

Having in mind the outlined variety of possible initiating partnerships and motivations, the following considerations are emphasising SME networks and employment initiatives as a practical example.

1.4.2. Local development and employment

Since the research-based publications of Birch (US) and Fritsch/Hull (Europe) in the first half of the 1980s, there is clear evidence, that the SMEs will be responsible for any growth in employment at the end of the 20th century. That is why local development by fostering and assistance of SMEs is crucial for the improvement of regional employment.

Regional development and SMEs

SMEs form the backbone of economic life in most of the European regions. They are responsible for employment and jobs as well as for products and services. Finally, the taxes they are paying allow governmental action. Even in regions dominated by large enterprises, regional SMEs play a key role, being suppliers for these large firms, subcontracting manufacturing or being in retail business.

According to their lacking capacities in various fields of enterprise modernisation there is a vital need of SMEs for specific external services in order to meet the economic and technological challenges of the future.

The situation for SMEs development is most problematic when regional resources of consultation in the fields of organisational development and human-resource development are concerned.

In general there is sufficient capacity for vocational training on a regional level to supply training for the different professions. But these training offers are not designed to meet the specific needs of SMEs in relation to the contents of training, the methods of training or the organisation of training.

A general lack of acceptance of HRD in SMEs is the negative consequence of this situation.

(a) Modern enterprises demand learning as an integrated activity within the enterprise. It means that external training institutions have to act in a customer oriented way to foster these activities.

(b) There is still quite a lot of confusion in SMEs concerning the role of HRD in management policy. External training institutions have a major role to play in dealing with stereotypes, traditional thinking and irrationality. This requires capacity and competence in consultation.

(c) There are also some real (material) restrictions in SMEs in relation to HRD. Most of them are financial and organisational (e.g. it is never easy for enterprises to send their staff to external, long-term seminars). Training institutions have to deal with this

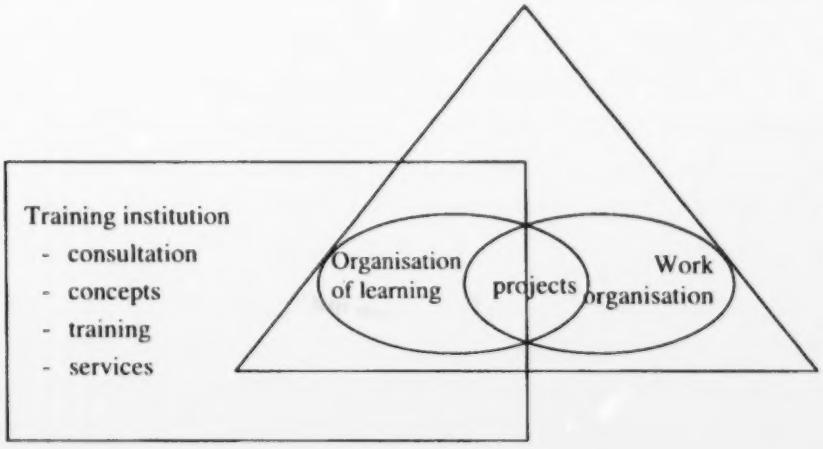
problems creatively. They should view these restrictions as challenges to foster innovative solutions.

(d) Training institutions need new concepts to meet these challenges.

A close cooperation between training institution and the small firm is needed to deal with the mentioned problems, that integrates the activities of the external institution and of the enterprise.

This cooperation includes integrated efforts on the analysis of the qualification needs, the development of concepts and programs of learning and training and the delivery mechanisms, evaluation and further planning.

Training institutions have to change towards consequent customer and process orientation. They have to develop services in consultancy which results in a need for new professions in that field.



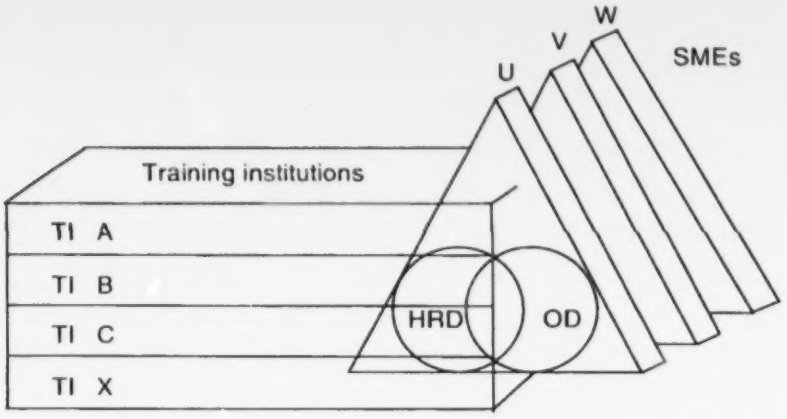
The inter-relation between the organisation of learning and the organisation of work also means the interrelation between the training institution and the enterprise. The term learning organisation in this case not only defines the restructuring of an enterprise to develop its abilities to learn, but includes an innovative method of cooperation between the training institution and the enterprise. The entity of this systematic cooperation is the learning organisation. To establish this kind of entity, comprising enterprise and training institutions, both sides have to accomplish many tasks in reorganising, rethinking and interaction ([11]).

([11]) See Stahl, Thomas; Nyhan, Barry; d'Aloja, P. *The learning organisation*. Brussels: 1993, p. 75.

or Stahl, Thomas; Stölzl, M. *Bildungsmarketing im Spannungsfeld von Organisations- und Personalentwicklung*. Bielefeld: 1994.

See also the ADAPT-project of the Technologisk Informationscenter, Slagelse (DK): Skaarup, U. Examples and points of view from the community of West Zealand, Denmark. In: *Lernende Region: Kooperationen zur Verbindung von Bildung und Beschäftigung in Europa. Berlin:* Friedrichsdorfer Büro für Bildungsplanung, 1994, p. 228ff.

A training consortium as a result of the close cooperation between training providers and SMEs



(a) As a result of the multidimensional service functions of training institutions, networking and cooperation of different regional training institutions must be established to compound their complementary competence in order to fulfil the service function.

(b) Because of the organisational and financial restrictions SMEs are facing, it becomes inevitable to group the trainees of several enterprises in one training operation and to establish joint programs of management training to different SMEs, etc.

In this way regional training groups are emerging simply as a result of the necessities of the training market in the segment of SMEs.

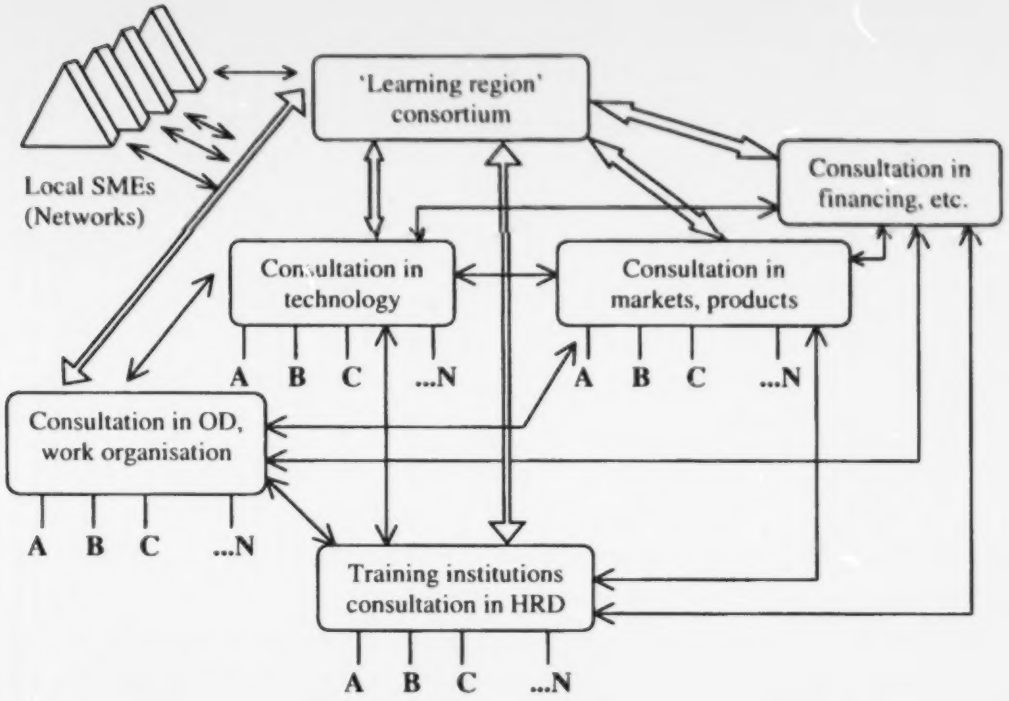
The advantage of this procedure is the strict customer orientation in the emerging training groups, the flexibility of their structures and their fractal organisation. That means that different structures, contents and procedures emerge if needed, but also vanish if no longer needed.

Other local service structures for SMEs (consultancy in marketing, organisational development and financing) are facing similar challenges in dealing with their customers. Again holistic thinking is lacking, tailor-made solutions are often too expensive and consequently the acceptance by the enterprises is rather low.

This description indicates that the approach of structural development on a local level in relation to SMEs development must integrate the different infrastructural services, must provide synergy and must act in a problem-oriented way to focus on the interdisciplinary problems SMEs are facing. ([12])

([12]) See for example the cooperation of university, private training and consultancy firms, chambers of commerce and common in the ADAPT-project 'Learning Region Chemnitz'.

We have to think in terms of a consortium of service-supplies for SMEs.



This new kind of regional cooperation also provides an approach for SMEs that is very common in large enterprises: planning and establishment of innovations in an integrated way by paralleling OD, HRD and technology application.

This practical cooperation of service providers for SMEs is a very basic element of the learning region. It is not governmental jurisdiction or planification that creates a potential of self-development and self-organisation. These processes only function through the innovative cooperation of all regional actors. Politics can only stimulate and initiate these processes by fostering and funding the creation of such partnerships. At the end there must be space for self-responsible creation of regional developments to enable learning regions. ([13])

In the field of SMEs development very concrete services can be listed, that have to be covered by the regional partnerships:

See also the ADAPT-project 'Learning Region Bitterfeld-Wolfen', where the training of entrepreneurs is systematically developed by a consortium of regional training institutions.

([13]) See the contributions of Ratti, R. et al. In: Camagni, R. (ed.) *Innovation networks: spatial perspectives.* London: Belhaven Press, 1991.

See also Grabher, G. *The embedded firm: on the socioeconomics of industrial networks.* London: Routledge, 1993.

(a) Management training and consultation in decision making in SMEs in relation to all elements of enterprise development.

(b) Providing an infrastructure of information and consultation concerning all aspects of the application of data-processing technologies in production or administration, that is easily available for all professionals in SMEs.

(c) Providing an infrastructure of information and consultation concerning innovative and adequate ways to organise processes of work in SMEs. Practical assistance to devise new methods of enterprise organisation should be available too.

(d) Providing an infrastructure of information and consultation concerning market analysis, advice in relation to market developments, opportunities, problems, etc.

(e) Providing a regional structure to foster product innovation. ([14])

In addition to the mentioned infrastructural assistance for SMEs the regional consortium must develop and foster programs for young entrepreneurs to stimulate enterprise creation. This includes not only the outlined cooperation of training institutions, consultants in the fields of technologies, markets and organisation but also the involvement of financial consultation by regional banks, information concerning public funding and, last but not least, a structure of large regional enterprises that are prepared to assist the young entrepreneurs with very practical hints and advice. ([15]) According large local enterprises are involved in the networks of SMEs.

The conversion of jobs has to be addressed as well as the conversion of enterprises obtaining new services. Regions that are mainly agriculturally structured, must find ways to restructure farms and agricultural enterprises to provide innovative services in environmental protection and tourism.

In short:

Networking and partnership of enterprises at a local level are mainly aimed at the creation of business services, the transfer and adaptation of technologies by local businesses, local human resource development as a major intangible investment in innovation and modernisation of enterprises. Local development lies at the heart of the search for a new development strategy by aiming in particular to boost entrepreneurship, to optimise all the productive potential and to activate human resources and the potential of competences in all the territories.

The advantage of local networking activities for enterprises (especially for SMEs) lies first of all in the mutual exchange of experiences, knowledge and intangible potentials that leads to local economic development by possible feedback loops between all of the participants.

([14]) In nearly all of the national OP ADAPT we find one or more of these elements of local development.

([15]) See for example the self-employment training. In Gwent, Wales UK as part of an ADAPT project. Davis, T. In *Lernende Region: Kooperationen zur Verbindung von Bildung und Beschäftigung in Europa. Berlin:* Friedrichsdorfer Büro für Bildungsplanung, 1994, p. 256 ff.

Then of course certain constraints of size (SMEs) can be overcome in these partnerships, that to a certain extend achieve economics of scale by common training, marketing, consultancy, etc. The main advantage lies in the evolution of an innovative culture of local enterprise development that results in snow-ball effects at the side of economic development and employment.

The local development initiatives must assume a persistent and lasting nature; hence it is important to integrate a long-term dimension into them and to include them in an overall perspective, taking into account the constraints of scale (critical masses). Local development must therefore be based on organisational mechanisms giving preference to the constitution of networks of actors and their ability to experiment.

The level of local development largely depends on the level of entrepreneurial activity. Consequently, public policies must focus on increasing this level of activity by encouraging local initiatives to be taken, since economic opportunities are identified more clearly by the people closest, and by seeking to create a favourable environment.

Local networking between enterprises is thus built on three pillars: (a) sound complementarity or identity of economic interests, (b) impulses and rules given by EU or national development programs and (c) the development of social values and norms based on long-term scenarios, local identification and personal trust and confidence.

Local networking and reorganising labour-market policy

There is a close connection between measures to ensure employment and local labour-market development. Today and in the future unemployment must be faced as the negative social side-effect of enterprise innovation and economic cycles. Given the situation of world-wide market development, we must face the fact of a growing population of unemployed, including long-term unemployed.

This situation can be improved by new models of job sharing, providing less work for more people. But it is also true, that these measures alone are not able to reduce the amount of long-term unemployed radically. Especially the groups with a high risk of unemployment (women, older workers, unqualified workers and people with health problems) are in danger of losing any chance for new jobs. The fate of unemployment does not only lead to financial problems of the unemployed, but in many cases this also means a severe individual crisis of self-identification, the loss of contact to the social environment, desolation and sickness.

What we need are solutions characterised by social solidarity that enable these people to find adequate, socially accepted activities without destroying existing market relations. The fear of unintended and negative impact on the market leads to a situation in which job-creation programs and second labour market is often treated as a taboo subject in politics and economics.

In recent years labour-market policy has been fundamentally reformed in some of the EU Member States; in others such reforms are under way or under discussion. What these reforms

have in common and what is novel about them is the reorganisation of the implementation of labour-market policy in order to improve the incentives for efficient actions especially by increasing competition and by delegating responsibilities to the local level. Privatisation, regionalisation, decentralisation and networking are therefore the keywords for this organisational reform. ([16])

The great hopes set in privatisation and decentralisation are delusive. The evidence suggests a mix of coordination mechanisms in which the endorsement of competition and the delegation of responsibilities to the local level are important but not exclusive elements.

This mix is not arbitrary but depending on context and goals of the policy programs. There will be no longer a dominant paradigm of societal coordination. Neither markets nor hierarchies can serve as the central guidelines for reorganising the labour-market policy for the future.

Certainly, labour-market policy has to strengthen cooperative relationships. Certainly, variety and competition between suppliers of further training has to be increased. Certainly, effective control of the public labour administration can be improved by decentralisation and performance oriented budget allocation. But there are also no doubts about the necessity of more central guidance and control through quality standards and corresponding monitoring. And there are no doubts about the necessity of revitalising a Community culture of further training which institutionalises the right to further training *de jure* or at least *de facto*.

Flexible coordination ([17])

The notion of flexible coordination of labour-market policies, sees the importance of local networking including the creation of value systems (communitarianism) as a key-element in the implementation of governmental labour-market policies. Still the implementation of this

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([16]) Active labor market policy: assessing macroeconomic and microeconomic effects /OECD. In *OECD Employment Outlook*. Paris: OECD, 1993, p. 39-80.

Reissert, B.; Schmid, G. Unemployment compensation and active labor market policy. In Schmid, G. (ed.). *Labor market institutions in Europe*. New York: Sharpe, 1994, p. 83-119.

Schmid, G.; Schömann, K. Institutional choice and labor market performance. In Schmid, G. (ed.). *Labor market institutions in Europe*. New York: Sharpe, 1994, p. 9-57.

([17]) Kenis, P.; Schneider, V. Policy networks and policy analysis: scrutinizing a new analytical toolbox. In Marin, B.; Mayntz, R. (eds). *Policy networks: empirical evidence and theoretical considerations*. Frankfurt/Boulder: Campus/Westview, 1991, p. 25-59.

Reissert, B. Regionale Umverteilung der Arbeitsmarktpolitik: Hilfe für Problemregionen. *WZB-Mitteilungen*, 1989, No 43, p. 5-8.

Salamon, L.M. *Beyond privatisation: the tools of government action*. Washington, DC: Urban Institute Press, 1989.

Schmid, G. Equality and efficiency in the labor market: towards a socioeconomic theory of cooperation in the globalizing economy. *The journal of socioeconomics*, 1993, Vol. 22, No 1, p. 31-67.

Schmid, G. Reorganisation der Arbeitsmarktpolitik: Märkte, politische Steuerung und Netzwerke der Weiterbildung für Arbeitslose in der Europäischen Union. (FS I 94-213). Berlin: Wissenschaftszentrum, 1994.

requested Community culture and the functioning of networking structures is an open problem for labour-market research.

Again the local networking of enterprises and local institutions (employment services, commune, training institutions, etc.) constitutes bottom-up developments also in labour-market policy. The enterprises, being employers, guarantee a good basis for anticipation in the field of training-need analysis for unemployed. Their own interest in an adequate qualified local human-resource potential leads to complementary efforts on their side concerning participation in employment programs and training. ([18])

Local development and training of unemployed

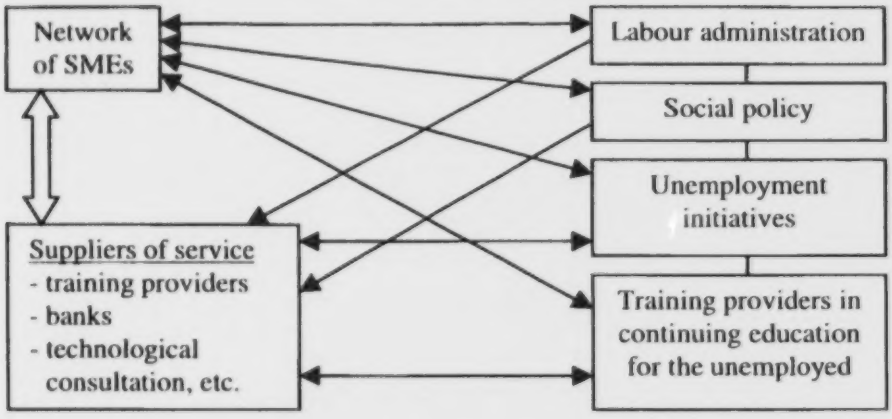
The traditional instruments for training the unemployed with the aim of their immediate reintegration in the world of work are not losing their importance, but they need to be focused and reorganised in a new way.

The concept of the learning region, creating a network that includes enterprises and service institutions in the field of HRD, provides the information basis for adequate training of unemployed, focused directly on needs and dynamics of the regional enterprises. ([19]) This focused way of conceptualising training action for the unemployed can be improved upon by integrating the local enterprises directly in the training processes. Some elements of this approach are visible today. Training institutions are implementing practical exercises at the workplace in their curricula.

Networks of the learning region would naturally be an ideal prerequisite to install this new way of organising unemployed training. Here we already find an institutionalised permanent communication process taking place between enterprises, labour administration and training institutions.

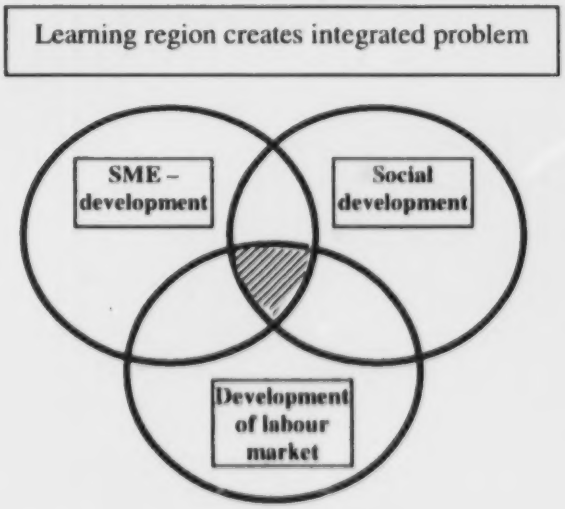
([18]) Under the ADAPT initiative we find quite an amount of innovative approaches in OPs and projects dealing with the problem of anticipation of industrial change at the enterprise level or at the level of local settings.

([19]) Anticipation of labour-market development is an in-built quality in these activities (See OPs ADAPT).



The main focus on re-qualification of the unemployed has to be seen by learning from the practical experience in local enterprises. Already in the past, training measures, including practical phases at enterprises, were more successful at reintegrating the unemployed in the world of work. This will become even more relevant in future as the transfer of know-how into the complex world of work is easiest by direct learning at the workplace.

Regional labour administration as a partner in a regional consortium gains entirely new opportunities to conceptualise and plan training measures and acquisition of new jobs being in a constant dialogue with enterprises and training institutions. This leads to the most effective procedures for the reintegration of the unemployed in the regional labour market.



From this regional cooperation structure, innovative solutions are thus made possible for the handling of long-term unemployment and for self-organised forms of social work.

The mutual search for new forms of alternative occupation for the long-term unemployed and its practical (organisational, financial) implementation is most definitely one of the most difficult challenges of the learning region. ([20])

It is exactly here where new community value systems, developed in local networks, have to be tested. But where, if not in a local context, these values of solidarity and mutual assistance are meaningful? Only in direct contact with the daily problems, the self-developed solutions can be evaluated by everybody and the final outcome of common efforts is seen in its consequences for the community and for all members of the community. ([21])

In this context of practical development work in local structures it is extremely important to use the model of communitarianism in a way of critical reflection on the basis of specific local interests and culture.

Of course the participation of enterprises in the mentioned partnerships will be motivated by their specific economic interests. The participation of employment services is motivated by their interest in improving the employment situation of their clients. The participation of training institutions is motivated by marketing interests, etc.

The initial phase of local networking in the field of enterprise modernisation and improving employment has to take these different motivations as a starting point, referring to the complementary character of interests, etc. Also in later phases of local networking, to satisfy these 'materialistic' motivations is vital for the survival of local development. But it is likewise vital for a broad success of the local development approach, that short term specific interests are complemented by long-term perspectives of all of the networking actors, gaining trust and confidence in the mutual added value resulting from their common efforts. Exactly here we find an interface connecting utilitarian motivation and value driven motivation referring to common interests as a good basis for one's own self-development in a framework of partners.

Long-term unemployment and second labour market

The described new way to organise training for the unemployed leads to the problematic result that many unemployed are no longer beneficiaries of these training programs, simply because there are no adequate jobs available.

([20]) See: Golz, L. Improving the chances to get a job for a region's long-term unemployed. In *Lernende Region: Kooperationen zur Verbindung von Bildung und Beschäftigung in Europa.* Berlin: Friedrichsdorfer Büro für Bildungsplanung, 1994, p. 267ff.

([21]) See Etzioni, A. *The moral dimension: toward a new economics.* New York: Free Press, 1988.

Again this discussion very often stops pointing at the need for more shared values and solidarity without becoming practical in answering the question how to implement this desirable value systems into labour-market policies and development networks of enterprises. The model of the learning region tries to combine the mentioned theoretical pillars in a practical way.

It is not enough to train and retrain these long-term unemployed to gain a chance for their reintegration into the world of work. First of all a new world of work has to be created for this group of the unemployed.

The term 'reintegration' of the long-term unemployed does not in reality mean the desirable integration in a regular job (though this should always be the final aim). Reintegration here means first of all social reintegration within a working society. The creation of new jobs must be a tool for that objective, even if these jobs cannot be generated by market demand.

These jobs could be created for example in the field of geriatric care, where they would provide subprofessional assistance for old people that is badly needed, without interfering in professional health care for the old aged.

Another example for these types of activities that meet a demand which cannot be marketed, can be found in the field of environmental protection. ([22])

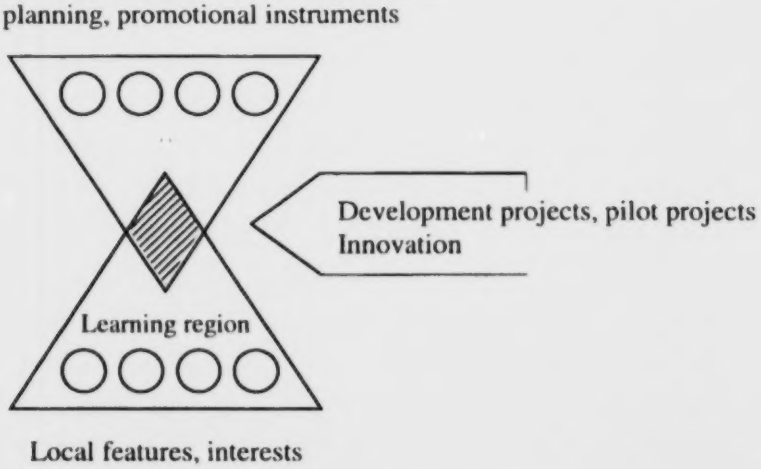
In order to establish structures for job creation partnerships and networks forming the learning region must first of all analyse the regional demands for these types of activities (including the analysis of problematic consequences for the market relations). Secondly these networks function as initiators and coordinators. The aspects of self-organisation and bottom-up development must be central in all of these initiatives. A regional consortium should never become a mega enterprise.

The transition of subprofessional activities into the structures of the normal labour market should be fostered whenever possible. The consortium groups of the learning region stimulate such possibilities by organising financial resources. Innovative combinations of different public funds and private sources must be created.

1.4.3. The learning region as an interface between funding programs and regional needs

The self-organisation concept 'learning region' is not contrary to the efforts of the EU and the individual Member States, to promote regional developments top-down, if they try to define the general direction of the development through the channels of central promotional programs. In point of fact, such regional development programs are specified by the networks and activities of the learning region to comply with requirements, acquiring the necessary dynamics for development via the regional practical operators.

([22]) See Stöbe, S. *Kooperationen in der lokalen Arbeitsmarktpolitik.* Opladen: Leske & Buderich, 1992. Stöbe presents quite a lot of empirical material about these types of practical activities in local labour-market cooperations in Nordrhine Westfalia.



One of the upshots of the cooperation forms of the learning region is the integration of the different regional requirements into innovations and development projects which fit the situation and set the trend for the future.

Vice-versa, the learning region provides the targeted make-up of a manageable range of promotional opportunities from EU programs and from national programs for each specific development project.

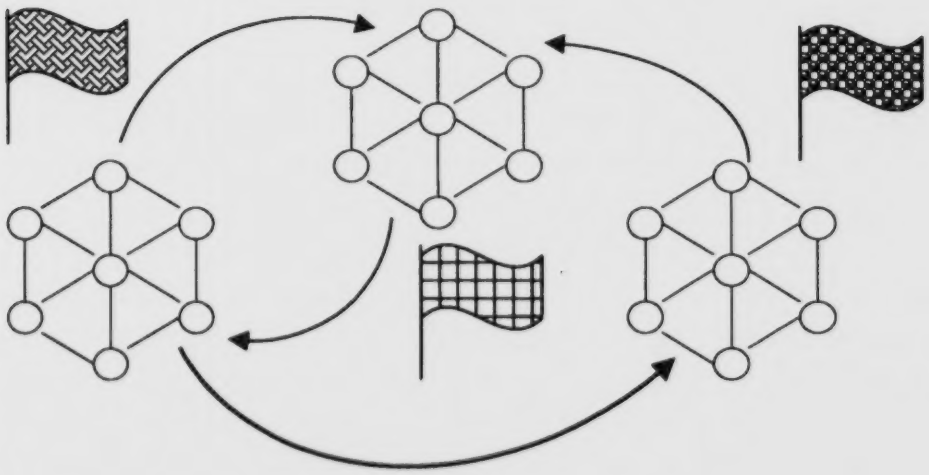
On the one hand it is thus assured that projects are promoted which really are of help to the regional protagonists of economic and regional development. On the other hand, public promotion gains security in terms of the adequate use of the tax payer's funds.

In bringing together both these elements of regional development (from 'above' and from 'below'), the organisation of the learning region becomes a very important assignment.

The European problems, resulting from industrial change, are described in the White Paper and again reflected in the guidelines of the ADAPT initiative. Industrial change is challenging for all regions and for all local structures throughout the Community. The challenges differ according to the different socioeconomic situation of regional and local settings. As a result, the approach of self development by the 'learning region' concept will lead to quite a variety of different approaches and solutions. That does not at all mean, that an exchange of experiences and practical cooperation between those learning regions would be impossible. In contrary it is especially the transnational and europeanwide cooperation that can provide a clear value added to the regional efforts. Perhaps not at a Member State level, but for sure on an European level local development approach will find a partner-region with quite similar problems and innovative solutions.

Transnational cooperation and partnership is an excellent means for developing learning regions.

Learning region = Transnational impulses



Finally, it remains to be said:

The learning region is an open development concept. Here too it corresponds to its model, the learning company. Yet, looking at developments, taking place already at different European regions, it becomes clear that there are indeed elements, individual components and practical sequence forms of the learning region which are found. At the same time the diversity of the concrete projects and structures make it clear that the concept of the learning region is open to variety; indeed that this variety is an important result of self-organisation and self-responsibility of the regions.

2. Advantages and drawbacks of the 'learning region' approach ([23])

Antoine Richard ([24])

As a project manager at CEREQ, the Centre for qualification study and research, in France, I work chiefly on regional public policies for initial and continuing vocational training.

As you know, France has not been among the advance guard of decentralisation. This is a recent development for the French, from a historical perspective at least, in the sense that it began only in 1982 and has developed only slowly and in stages. It was not until 1993 that the Region, as a public institution having an elected Regional Council, was given the task of coordinating initial and continuing vocational training action, although its powers did not cover all education and training systems. The Region has a role of leadership and coordination with a view to making public action more consistent. It is this area of investigation and research for which I am responsible at CEREQ.

I am particularly pleased to take part in this Agora on the learning region since this is a concept that is completely new to me in the sense in which it has been presented in the preparatory documents and in the two preceding papers.

I am finding out about it with interest because it confirms a few observations that I have made here and there. These have led me to consider that learning needed to be linked with the formulation of goals by the learning actors, to step up their motivation and to develop their centres of interest. This is true in pedagogical terms and is also true as regards the construction of the education system.

I also bring toward it a degree of scepticism, as I feel that the sum of local initiatives in learning regions is unlikely to shape an overall policy of vocational training.

Nevertheless, it is a useful concept because it is making me ask questions about my own vision of public policies, which may be overly top-down.

([23]) This text is taken from the transcription of the paper given by Antoine Richard at Cedefop's Agora XI, Thessaloniki, 15 March 2001.

([24]) Project Manager at CEREQ – *Centre d'études et de recherches sur les qualifications* (Centre for study and research on qualifications)

There is therefore food for thought here.

In the introductory sessions this morning, and in particular in the introduction by Cedefop's Director, a particular emphasis was placed on the development of informal learning in our contemporary societies. While there is no doubt about this development, it raises a number of questions to which we currently have only partial answers: how can we make informal learning visible? How can we give it social recognition? How can we promote it?

Barry Nyhan felt that the learning region was a system of cooperation between the actors of civil society. I am not sure, however, which actors come under this heading: the actors of political society? The institutional actors? All of them? Should others be taken into account as well?

I agreed with Thomas Stahl's conclusion because it helped me to understand this question somewhat better: pressed by Éric Fries Guggenheim, he acknowledged that the learning region, whose approach is typically a bottom-up approach, has to find ways of linking with the top-down approach of national or supranational institutions. Learning regions must also be able to contend with the top-down approach towards construction. This is to some extent the question that I should like to address today.

When you invited me to this Agora you asked me to look at the advantages and drawbacks of local initial and continuing training policies and the problems raised by their development. To do this, I shall take as my starting point the work conducted between 1994 and 1999 to examine the impact of the regionalisation of public vocational training policies in France as set out in the 1993 law. On behalf of the national coordination committee for regional continuing vocational learning and training programmes, CEREQ conducted investigations in the 26 French regions.

This work helped us to flesh out the notion of 'regional governance' understood as the process of coordination of the public and private actors on public education and training measures. Regional governance is essentially reflected by the construction of different partnerships (bilateral, multilateral) among public actors (Ministry of Education, Regional Council, decentralised services of the Ministries of Labour and Employment, Agriculture, etc.). These partnerships are therefore forged with a view to managing the public system of vocational training in a more consistent way. Education, vocational training, labour market links and enterprise needs are all concerned.

We need to bear in mind, however, that these are for the most part institutional partnerships. These partnerships are generally constructed around an actor whose task, laid down by law, is to coordinate the work of the local actors. At this level, we did not therefore, in our investigations, come across the local or regional projects that have been described here. These projects, very interesting as a result of their lack of institutional frontiers, are framed to fit the more or less collective interests emerging from relations between the actors in a given area.

This then raises the question of 'the complementarity between these emerging learning regions' and the innovative public intervention shaped by the process of regionalisation of training policies that is under way.

I should like briefly to put forward three ideas:

First: my feeling is that in France the regionalisation of vocational training is a process of collective learning by the public actors and the actors representing private interests against a background of a one-off, highly sectoral public intervention tradition. As Thomas Stahl has pointed out, in this tradition everyone looked after their own interests without taking account of the collective interests of the area. Public intervention therefore has a great deal to learn about the complex reality of areas, and I shall return to this. This collective learning process has a number of advantages, which I shall stress.

Second: regionalisation as a local approach to initial and continuing vocational training raises a problem. The region is not an end in itself. It has to be related to the supra-regional, the national and the European, so that common and consistent frameworks can be constructed for vocational training policies. The issues that come to mind here are certification and recognition of learning from occupational experience; social and occupational mobility; the issues raised by the legitimacy of local actors' representation in the construction of an overall policy.

Third: our investigations of the regionalisation of initial and continuing training have shown that so far it has not managed very successfully to link up with regional dynamics. My feeling is that the new regions, which are learning to govern in other ways, are still trying to find their territory. Decentralisation or regionalisation in terms of public intervention does not necessarily go together with a consistent approach to diversity, or, especially, to the development dynamics of area actors.

I shall briefly look at these three observations.

The first issue is how the learning process is linked to regionalisation. About this I should like to make three comments:

(a) It is by agreeing on a jointly formulated diagnosis that we learn. We observed, though this was in no way uniform or systematic, that it is when the various partners work together around a table to draw up a diagnosis that progress can be made with people's attitudes through the exchange of points of view and frameworks of action. It is not by speech that progress is made, however, as such diagnoses need to be anchored in reality. Local expertise is needed to support the local actors in constructing a new edifice.

(b) Another point on how learning is linked to regionalisation: the collective construction of regional action frameworks fosters cooperation between the various institutions. Each of an area's public actors has its own framework of action. For the Ministry of Education, the aim is to increase pupils' standards of education, etc. Chambers of commerce and trade and employers' organisations will be attempting to find the best possible match between learning and the acquisition of qualifications and the particular features and

needs of small and medium-sized enterprises. The Regional Council and local labour and vocational training departments will be seeking to make progress with social integration by offering continuing training for young people with problems, etc. All these issues have a part to play in beating a path towards qualification and employment. If such a path is to be constructed, shared frameworks need to be built up. That is, the Ministry of Education, labour services, enterprise representatives, et al., need to focus their work on the same notion and, from a joint diagnosis, build up a common framework for the area.

(c) Final comment: developing jointly constructed intervention procedures and tools contributes to the dynamics of the learning region. Drawing up clauses for training quality which are common to the various partners is one way in which training can be better matched to the needs of individuals and enterprises. It has been said that enterprises did not need information, they needed solutions. So how can the relationship between a vocational school and a series of enterprises be set up in such a way as to provide training solutions? In what way can it be constructed, including its teaching aspects?

The second issue concerns regionalisation and the new requirements it raises at supra-regional level. Two comments need to be made here:

(a) Legitimacy of the local actors. We noted that decentralisation and the devolution of vocational training and learning processes to the local level raised several questions: How can we determine which actors are empowered to act in this field? What form should their representation take, in respect of both the professional organisations engaged in awarding diplomas and certification and the institutional actors, such as the Ministry of Education, engaged in creating training frameworks for individuals' qualifications. These issues of actors' legitimacy raise the problem of finding out how the national and regional actors can be organised so that they can take an active place in learning regions.

(b) Regarding the legitimacy of recognition and certification processes, the need to create a link between the regional and the supra-regional level is obvious. I would not be very keen to see any dualism between, on the one hand, a regional and national training policy with a centralised validation and certification systems and, on the other hand, a learning region's system, independent of the centralised systems. What we need to guarantee is the social recognition of the validation and certification of skills and qualifications, and inter-regional or even international mobility.

The third and final type concerns the issues of equity and equal access to qualifications. The concept of the learning region includes an extremely interesting objective, i.e. the introduction of the knowledge society. However, the knowledge society is composed of a number of individuals who do not have equal access to knowledge. Steps need to be taken, when constructing a local or regional training policy, to guarantee that everyone has the same access to knowledge. We run the risk, in the learning society of the Community, of allowing the development of cooperation between actors whose legitimate private interests are not representative of everyone's interests. Who can guarantee that there will be no collusion between particular local economic interests and local or national political interests? The relationship between the actors of development and the actors represented politically and

institutionally when constructing a local or regional policy is a genuine question, and one, which we certainly meet in our fieldwork.

To conclude, I would say that the regionalisation of learning, in the sense in which I have sketched it out, involves other forms of concerted action by, and coordination of, public and private actors for the purpose of policy formulation. We need to modify our methods of intervention to fit the needs of the area. This can be achieved through shared diagnoses, changed procedures and the linking up of top-down and bottom-up approaches to decision-making. The learning region can then be seen as a cooperative society based on learning in respect of concrete problems.

How can this link be forged?

Possible paths seem to be emerging, but still need to be discussed.

On the one hand, public institutions can help to identify issues and introduce engineering measures that local systems do not always have the wherewithal to develop. In local society, universities and vocational schools can help to identify issues and introduce engineering in order to develop local training systems which meet the needs of associations and enterprises. In France, there were various experiments between 1994 and 1999, such as the agreement between the Regional Development Delegation and the Schools and Colleges Delegation at national level, to try out links between school and enterprises. The results were very patchy. Where it worked, however, you had the feeling that important things were starting to happen. The question is then one of finding out what can be done to promote such developments through public policy.

Training institutions also need to be encouraged to take an open attitude to their surroundings in planning. This is far from being a minor issue in France where vocational training establishments traditionally take a sectoral and vertical approach to training. Instead of building a plan around the mere transmission of knowledge to individuals, it is therefore necessary, as Barry Nyhan has said, to set it up on the basis of individual and collective needs. Training establishments therefore have to be open to their environments. A training establishment is a complex entity. It is run by a board of management including various types of actor (local politicians, representatives of the administration, economic and social partners, students' parents, students' representatives). Operationally, it is run by a principal and has teachers in various disciplines and a supervisor. The question that then arises is the way in which the school's actual socioeconomic environment can be converted into a dimension of its plan.

Lastly, one of the main ways in which grass-roots initiatives can be linked with institutional policies is to make the partnership approach essential for the conduct of everything that takes place in this learning society. When learning society projects are being set up at local or regional level, systems must also be introduced to monitor not just their economic but also their social impact. The real beneficiaries of education and training in the 'learning region' approach and those who have been left out need to pinpointed and monitored. This is the task of the public authority elected by universal suffrage.

I have the feeling that as decentralisation progresses in France, the Regions, as political institutions, may be one of the focuses both for the convergence and linking up of national and regional training policy and for the creation of 'learning region' project initiatives, as discussed by Barry Nyhan during this Agora.

3. Constructing learning regions: contributions from social research

Björn Gustavsen ([25])

3.1. Introduction

While most European economies have focussed on the large enterprises, recent years have seen a turn towards small and medium sized ones and the conditions for their formation and growth. SME's do not emerge out of nothing and in seeking an understanding of what contexts seem able to promote this kind of enterprise the notion of region has come strongly to the surface. This does not mean that all SMEs emerge out of regions nor that all social structures that live up to the notion of region automatically generate enterprises. What seems to be the case is that the notion of region provides a key to the understanding of some of those forces that are critical in the creation of new enterprises and in maintaining living populations of SMEs. Often pointed at in this conext are regions like Emilia-Romagna and Veneto in Italy and Gnosjö in Sweden (Berggren et al., 1999). These can, however, be seen a special examples of a more general trend.

Rather than talking about 'regions' it has become common to add 'learning' to indicate that of special inerest are those regions that seem able to initiate and sustain processes of change and renewal. One may even go a step further and say that the chief characteristic of a region able to create strong and living populations of SMEs is, by definition, the ability to learn.

Given this, we face a growing interest in the notion of learning region. What is a learning region and how do we promote this kind of phenomenon?

3.2. Characteristics and activities

In approaching efforts to answer this double question we find a split, between those who place the main emphasis on the first question and those who place it on the second:

Among the descriptive-analytic contributions, the significance of the notion of region can be given a more or less radical implementation. Whereas 'region' can be taken as a complement to the kind of globalised large enterprise which is still generally seen as the main type of actor in the modern economy, it has become increasingly common to assign 'region' a deeper and in a sense more revolutionary meaning. The underlying line of reasoning can differ in detail but

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the core point is that we are in transition from one kind of economy to another. The kind we are leaving behind is often called Fordist and thought to be represented by large enterprises, highly specialised work roles, hierarchical organisation, long series of identical products, learning concentrated to limited parts of the organisation (management, development departments), linear processes of innovation. Successively, a new kind of economy is taking over, referred to by terms like post-Fordism or network economy. Main characteristics are flexibility and business success through small series and individualised products, interactive learning and non-linear innovation processes. These characteristics are associated with alternative forms of organisation that, in principle, negate the Fordist pattern point by point. Instead of the hierarchical, the horizontal is emphasised, instead of creating large organisations the potential of cooperation between smaller enterprises is emphasised, instead of each enterprise having all knowledge within its own ranks the potential of an external support system is brought to the fore, instead of relying on small 'elites' for all thinking and innovation the potential of broad mobilisation is actively explored.

At the core of the new pattern is learning and the idea of being competitive through continuously introducing something new rather than keeping on making 'the same' although continuously cheaper. Learning, however, is, as pointed out by Porter (1990) a localised process: it has to occur somewhere, between a specific set of actors. Consequently, the question emerges of where these locations can be found, or actually: what kind of location is most optimal from the point of view of creating learning processes.

Numerous contributions are made on this point. The roots are often brought back to Marshall (1920) and the idea of 'agglomeration'. Agglomeration refers to populations of enterprises and points at their physical and social relationships to each other in terms of geographical territory, density and patterns of interaction. The introduction of this notion is linked to the observation that populations of enterprises living up to certain criteria in terms of mass, density and interaction seem to constitute strongly competitive systems.

This notion has been carried on and further enriched in a number of ways. In addition to the points mentioned above, such elements as the relationships between economy and civil society have been pointed out the significance of trust for economic performance (Lorenz, 1992; Sabel, 1992) and the need to build trust on localised specific social relationships which allow for actual interaction. Lundvall (1996) emphasises the point that much of the knowledge needed for successful economic performance can only live among specific actors in specific contexts and does not make itself subject to generalisations and abstractions. Sharing of such knowledge can occur through participation only, which needs, however, a framework and 'region' can combine a reasonable degree of social nearness with a reasonable amount of resources and mass. Amin and Thrift (1995) point at the potential for an enterprise-external support system which can supply much of the knowledge and skills falling beyond what the SME can manage on its own.

A number of contributors (Lundvall, 1996; Edquist, 1996; Asheim, 1998; Ennals and Gustavsen, 1998) make the point that innovation does not pertain to products only, but to

process and organisation as well. While it is at least possible to create product innovations on the basis of decontextualised knowledge this cannot be done within the other areas. Process innovation can not be created by introducing new 'technological packages' into the workplace; change has to be mediated through the reflexivity of the actors concerned. This demands a different 'logics' than pure technology-based innovation.

To this point of discourse and analysis *we can be brought by descriptive-analytic research. But* how about creating learning regions? Can anything be done to actually promote this phenomenon?

In a sense the obvious answer is yes since all regions are 'man-made'. There must always be some actors who, at certain points in time, have made certain decisions and performed certain acts that have implied a movement towards what can be called a learning region. However, in descriptive-analytic research these actors are often pushed into the background and seen as themselves being condition by 'objective forces' such as 'culture', 'history', the existince of a 'civil society' and similar. Few of the contributors within the descriptive-analytic traditions go into how to create learning regions. There are some exceptions: Sabel (1992) touches upon the potential of interventions from 'third parties' and mentions consultants explicitly; Porter is performing a global consultancy, largely towards governments, which must be built on the assumption that a 'chain of influence' can be established between research and practical effects with governments as mediators.

To some extent this overall lack of concern for 'how to create' is somewhat surprising. If we presume, with Lundvall (1996), that much of the knowledge of critical significance to innovative processes is context bound; what about the knowledge needed to organise the innovation processes? Can this knowledge be fully decontextualised, presented in global reports and fed into new regions through governments? This does not seem very likely and in particular not if we consider the role of such dimensions as trust. If we presume, with most proponents of the idea of learning region, that innovation demands localised processes of learning, how is learning about 'how to learn' to take place? If most learning depends on processes of interaction: how can research on learning regions learn anything without interacting with other actors? And if there is a need for specific processes of interaction with actors involved in the development of learning regions; how can research itself avoid becoming involved in processes of regional development?

Questions of this kind have given rise to another approach which is based not on searching for characteristics but rather on active participation in the innovation process. Rather than ask research to describe characteristics one may instead ask research to involve itself in the innovation process: actually to innovate.

While the role of innovation partner is quite well recognised for technological research it is less common as research on organisation is concerned. Recently, however, this has started to change. To some extent regional development is becoming a more important topic in action research and related fields (Gustavsen et al., 2001; Chisholm, 1999; Totterdill, 1998; Garibaldo and Telljohann, 2000). To some extent we also, however, see a 'pragmatic turn' in

descriptive-analytic research. By this is meant that instead of research talking to an abstract public (which seldom exists) it turns more and more to actual actors. The researcher who has something to say on regional development should say it to some regional developers. However, as soon as this kind of dialogue is established some consequences follow: A conversation with, say, a group of actors responsible for the development of a particular region can not be a one-time event only. When the actors try to use the knowledge derived *from research they will face new challenges and new problems and they will want to continue* the dialogue. Research has to enter a new phase of dialogue which will, in turn, give rise to new questions and new dialogues; in fact, to just the kind of interactive process which is argued to be at the core of the notion of learning region itself. In this way, contextually oriented research on learning regions starts to resemble the dialogue-oriented kind of action research which has evolved over the last two decades (Gustavsen, 1992; Reason and Bradbury, 2000).

Although one may speak about a mutual enrichment there is, however, still a major difference in points of departure. Whereas one approach aims at 'objective characteristics', however open and pluralist, the other tends to end up with much more emphasis on processes and procedures; on how to set about creating new patterns of relationships. Some rather pointed examples of the last approach can be found in Gustavsen et al. (2001) where a workplace development program in Norway is presented. This effort did not quite reach the kind of mass associated with 'region' but worked with seven networks and a number of single enterprises with the main purpose of helping create innovation. In this kind of effort the initial focus is on how to get into contact with the enterprises; how to establish dialogues with the enterprise actors; how to merge enterprise perspectives and research perspectives, how to develop relational competence in the enterprises (a necessary prerequisite for working in any kind of system); how to locate activities in space and time in such a way that they reinforce each other within an overall process, and similar. As emerges from Gustavsen et al. (2001) there can be much to be said at the end of a process but little of it may pertain to objective characteristics of the patterns that have been created.

On the surface it is easy to agree that both approaches are needed. Obviously, in embarking on a specific process of development it is useful to have in mind many of the points generally put forth in descriptive-analytic research, such as the 'triple helix' analogy reminding us that in modern innovation systems we need a close cooperation between enterprises, research and public authorities. On the other hand, the one who actually wants to promote innovation needs to be able also to create this cooperation and it is seldom enough to quote the triple helix analogy to the actors concerned. Knowing something does not automatically make us able to do it.

In building bridges between what we know and what we do there are two paths that have generally been pursued. One is to turn what we know into methods, that will allow us to do things in such a way that we make real what we know. Insofar, as we cannot go directly from what we know to what we should do, we may need some applied research to fill the gap between knowledge and methods. These approaches become, however, problematic. The

reasons for the problems are exactly the same as those that underpin the interest in learning regions and interactive innovation systems in the first place: the difficulties with making knowledge into 'objects' and the limitations of linear innovation systems.

Whereas the notion of learning region has been developed by researchers who use research to understand the social organisation of economic processes, the kind of research to emerge from these efforts have an astonishing number of points in parallel with recent efforts from researchers who turn the spotlight of research on research itself, such as Gibbons and colleagues (Gibbons et al., 1994) but with a number of forerunners, such as Toulmin (1990; 1996). These authors argue, quite convincingly and with examples drawn from the full spectrum of scientific activities, that science has for a long time been involved in a process of contextualisation. More and more, science, even in its most sophisticated forms, appear as responses to specific situations. When research mobilises its resources it is to create something that can fill functions, meet needs and create advances among specific people in specific situations. Research has to interact with the other actors present in the relevant context and in actual practice become a partner in dialogue. Then, however, the context becomes of critical importance, and in two ways: First, to understand how research actually functions, such as research on learning regions, we need to locate this research within a social context out of which the challenges to which research responds emerges. Second, to improve on research – create 'better science' – we actually need to put a lot of attention to the context in which each separate process of science unfolds. We cannot hope to improve on science without improving on the products delivered by science and we can not hope to improve on these products without improving on the contexts where the products are to be delivered.

In this way we arrive at a major point: research on learning regions can not be discoupled from specific contexts that create the challenges to which research responds. These contexts can differ but there are forces that bring research to see the region itself as this context. Among these forces is the need to see research as involved in an interactive learning process in dialogue with specific other actors. Research on learning regions becomes regionalised and itself a part of the resources needed to create a learning region.

Obviously, there will always be a number of elements in terms of knowledge, methods and so on that transcend each specific context. Research on learning regions will never be completely regionalised. The particular configuration of the elements posing the challenges to which research will have to respond will, however, vary from situation to situation. To deal with a specific research challenge a number of researchers will be brought together – each one representing a certain reservoir of knowledge and forms of work – to function within a specific context which defines the challenges to which research has to respond. No such setting is subject to a simple reductionism; it will always contain a large number of elements and in a unique combination. The work performed by research will take the form of dynamic responses to these elements where not only numerous concerns need to be made initially but numerous events will occur along the road as well, each event placing its mark on the overall process.

To point at these perspectives is not restricted to Gibbons and colleagues but has, in fact, been a trend in theory of science for decades in the sense that the core message of 'post modernism', 'de constructivism' and related schools of though has been the impossibility of general criteria and universal reason, autonomous theory and objective methods. It can, however, be argued that these contributions do not follow their own argument to its logical end. There is a problem remaining. The problem is that either science will have to seek its legitimacy in 'pure thought', such as argued by Descartes, or it will have to seek recourse to its ability to function fruitfully in practical situations. When 'the practical situation' is assigned a generative role in the formation of 'science' it does, however, not only mean contextualisation and individual variation. It actually also means that in the process of interaction unfolding between research and its 'users' in a specific context it is the practical side which is in the lead. The practical problems are constituting the challenges and it is the practical consequences of what research and other actors do jointly which constitutes the core outcome. At the end of this argument is the conclusion that research can not avoid itself being active in creating those practices that constitute the context of the research process. Or, to phrase it in a different way: the research process can not be separated from the context in which it unfolds.

How, then, do we, more specifically, form and position research on learning regions? In indicating some elements in an answer to this challenge it is important to note that we talk about 'research' as an institution and not as individuals. There is no research on learning regions and similar issues that is not useful somewhere, in some context. This is not the point. Like in all other fields of knowledge one can, however, not stay content with individual performances and piecemeal contributions. There is a need for some kind of integrative mechanism and this mechanism should, not least when research is concerned, correspond to the notion if innovation system. Research has, so to say, to take its own medicine.

But how do we do this? To embark on a process of creating or supporting a process towards a learning region, there is a need for a minimum of constitutive acts. Although we will not know, when embarking on a process of creating such phenomena, where we will eventually end up, we must at least have a starting point. What we need to demand from this starting point is that it contains elements that will bring us, if they multiply and grow, towards the successive realisation of the idea of learning region.

3.3. Constituting the point of departure

First, it is necessary to accept that the point of departure, even for the efforts of research, is a practical need, not a theoretical position. For research to enter the field of learning region research must find the task of creating more regions with better ability to learn to be a practical challenge worth taking up. There is no theory that, on autonomous grounds and irrespective of practical concerns, constitutes a force that so to say forces us to become involved in understanding learning regions. We can, of course, say that curiosity drives us, but curiosity is hardly a fully legitimate scientific concern in its own right.

When entering upon a process where actors in the context have a legitimate right to influence the process, there emerges a number of issues pertaining to what is an actor in the context and how research should relate to such actors. If we, as researchers, are to be open to influence from other people we need to act in certain ways ourselves. We need to listen to what other people actually do say, we need to make their expressions subject to a friendly and constructive interpretation, we need to help them come forth with their thoughts and we need to listen to all concerned. Research has to engage in dialogue and it has to demonstrate, through the way in which it chooses to act itself, how the notion of a good dialogue partner should be understood (Gustavsen, 1992). This point may seem trivial but if we look at the long and complex history even of action research we see that this is far from the case: up until recently even action research has generally acted as if 'it knows best'. Presently, however, there is a trend towards dialogues with more balanced patterns of influence, reflected by concepts like cooperative inquiry, collaborative inquiry, participative inquiry, naturalist inquiry, appreciative enquiry and similar (for comments as well as presentations of these and related schools in action research see Reason and Bradbury, 2000)

Here we enter the terrain developed by contributors like Apel and Habermas: the notion that the rational lies in the process of communication itself rather than in its output. If we want to create things together we need to rid our relationships of power and manipulation (and even plain *Besserwissend*) and meet each other in constructive openness. From this point Habermas proceeds to the creation of a major theoretical construction, in terms of a foundation for rational communication (Habermas, 1984-87). Eking out assumptions underlying our everyday forms of communication – such as the point that everyday life demands that most people speak the truth in most situations – he turns them into universal prerequisites for good, or free, communication. This effort has, however, also encountered criticism: If it is so that 'grand theory' falls apart as content is concerned, is it reasonable to come up with a new grand theory within the field of communication? Is not this simply to shift the problem from one theoretical sphere to another? This argument has been underpinned with various more specific points, such as the Wittgensteinian perspective that most language is acquired through learning by doing and not by making explicit a list of universal rules for good communication which are then deductively applied in all situations of everyday communication. And if learning by doing pertains to the acquisition of language in general it also pertains to research: to see all communication as expressing certain basic rules which can be laid bare by research is akin to pulling oneself up by the hair.

In spite of these and related forms of criticism it is, however, still worthwhile to pursue the Habermasian point but to build it on another platform (Gustavsen, 1992; McCarthy, 1993). Looking around in our society, we actually find 'principles of communication' in various contexts, not least the democratic constitutions today ruling most western societies. These principles include such elements as the freedom of speech, the right to be heard before the authorities make decisions pertaining to the individual, the right to defend oneself in open court against criminal charges, the freedom of association, and so on. These principles are not theoretically constructed. Rather, they are practical expressions of what the founding fathers of these constitutions thought were universal human needs In this they may have been right or

wrong; the point is that today these requirements have been made subject to long processes of historical validation and are subject to broad public support. In this context it is of secondary interest if it is the nature of the people that has conditioned the principles or the nature of the principles that has conditioned the people.

Principles of this kind, and the practices through which they are expressed, do not constitute a closed universe. They are points of orientation rather than imperatives unequivocally fixed in social space. They do, on the other hand, constitute sufficient points of departure for constituting partnerships and dialogic communities even on other levels of society. Within most areas there are, furthermore, established practices of communication that can be used to establish some further points (Gustavsen, 1992). It is necessary to emphasise that within a development context no criteria need to be frozen; they can all be continuously tested and enriched in the process itself and can, ultimately, be validated through the experiences of the actors involved themselves.

When such dialogic communities are established they offer a unique mechanism of self-validation. By developing dialogues and performing practical actions the participants can build on practical experience in assessing the dialogues and developing them further (Gustavsen, 1992; Räftegård, 1998). A theoretically generated, once-and-for-all notion of dialogue will lack this possibility. All contingencies will have to be foreseen in advance, a requirement which it is almost impossible to meet.

Given this, we can approach the idea of learning region by identifying it as a social landscape where the actors are able to relate to each other through democratic dialogue. By calling the dialogue democratic the idea is not to say the same thing twice – a dialogue is generally democratic – but to link the notion of dialogue to the practical expressions of democracy.

Contrary to a single organisation a region is perceived as a social or socio-political community. It will generally have political institutions that reflect the social and political order on the level above: generally the nation state, and the level below which will often be the municipality. In most European societies today these levels are democratically organised and the region is no exception. In this way the dialogic requirements inherent in the democratic constitutions will actually be not only remainders and points of orientation; within certain contexts they are even legally binding.

While a region can be subject to the practicing of democratic dialogues it has certain advantages compared to the nation state, in particular in terms of nearness in relationships. Although a region may be substantial in terms of population it will nevertheless have more density and less social distance and differentiation of roles than the nation state. A municipality will of course have even more connectedness but the problem with the municipal level is that it is, in most cases, too limited in resources to really play a key role in the development of enterprises and economy.

We can, consequently, add a second point: A learning region represents 'an optimal' combination of connectedness and mass. 'Optimal' must be taken in the everyday language meaning and not the systems theoretical.

In an effort to help create a learning region, or promote a development which already exists, these concerns must be built in from the start. Open dialogues have to be the generative mechanism and the aim must be to pull a successively growing number of actors into the process. As pointed out in Shotter and Gustavsen (1999) this means to embark on a long and complex process where little can be predicted at the outset. Numerous events will have to be staged, in parallel and sequence. Since the scope and direction of this process are influenced by all new actors who enter the process there is no way in which it can be fully structured in advance. Beyond the historically legitimated notions of participative democracy and dialogue there are no 'laws' that can be superimposed. There are, however, a number of concerns we can bring with us; concerns that to some extent emanate from experience with development efforts, to some extent from the descriptive-analytic research contributions to the notion of learning region. Below, some of these will be briefly touched upon. The aim is to exemplify, not provide a full list. With the speed and richness with which the literature on innovation systems and learning regions actually unfolds such a full list will be impossible, anyway.

3.4. Concerns to guide the effort

First, it is necessary to remind ourselves that given a lack of unequivocal criteria we cannot define specific regions ahead of time. If our task is to help initiate and sustain a process of development that may eventually lead into something that can defend the name 'learning region' we can not say in advance exactly where this will lead us. What will usually be the case is that we confront some actors who would like to work on this idea and enlist the help of research in doing it. 'In the beginning' it can be a rather small group of people who constitute the context.

Second, it will seldom be possible to move directly from such a small group and to 'the region as a whole' in one sweeping movement. The need for the development of dialogues imply that we have to start by creating more limited contexts where the participants can embark on dialogic processes and develop their own dialogues. Small groups of enterprises will often be a fruitful context for this, with participation from management as well as from the employees in general. The reason why small groups of enterprises are to be preferred over single enterprises is that in such groups – or small networks – it is not only the possibilities for horizontal relationships that are good, so are the possibilities for diagonal relationships, that is: relationships where, say, a union representative in one enterprise can meet a manager, but not a manager in the same enterprise. Diagonal relationships are essential to any democratic system and a region actually provides rich opportunities for just this. They need, however, to be developed.

When a number of such smaller dialogic communities are created, the next step is to link them. When the actors concerned have developed firm platforms for their dialogues and the ability to learn from the flow of impulses in such networks, the flow can be increased and enriched by linking different networks to each other. There is, on the other hand, little point in fully merging all the networks into one since this will only water out the primary dialogic relationships that need to be maintained.

If a number of such networks – corresponding to the industrial districts in the Italian regions' (Cossentino et al., 1996) or the subnetworks of the Gnosjö region (Brulin and Gsutavsen, 2001) – can be brought to relate to each other, elements of a regional structure will emerge. What is needed to call something a region will depend on a number of circumstances. In Gnosjö the level of region is defined as encompassing about 100 000 people; the Italian regions are on the level of the smaller nation states (4 million in Emilia-Romagna, 4.5 million in Veneto). Within an Italian context, Gnosjø would be seen as an industrial district rather than a region. There is, however, little need to make any ultimate decisions as conceptual strategy is concerned. In building regions from down below the process will be dynamic anyway, and in the same way as 'the beginning' can be very limited, 'the end' can literally speaking be endless.

Notions like democratic dialogue and broad participation cannot always count on a broad initial popularity within, say, the business communities. How to create the requisite connectedness when many of the actors may be opposed to the core elements in the process?

In the debates on industrial society evolving over the years it has been quite common to express a cynical-sceptical view on the potential of democratic orders, not least by academics. Often, this attitude has corresponded well to empirical realities. It does, however, not solve any problem, except perhaps by refraining from even making an effort at introducing a democratic order in working life. The reason is that there is no other way. In particular, there is no 'theory' that can coach all unions and all politicians into joining in an 'alliance for democracy' that is strong enough to force other actors to join, even if true democrats could be created by force. In actual practice, working life and its actors constitute a far more pluralist field. In particular today, with the need for responsible actors in all work roles and for continuous innovation throughout working life, the development is towards increased freedom and responsibility in the work role. About this there is little doubt. The challenge is to create processes that make it possible for all concerned to share the potential inherent in this and avoid a new generation of imbalances, differentiation of roles and work-conditioned problems. The alliances we can make in favour of this cut across all groups, so do, by the way, the alliances between those who fail to see the emergent needs.

The challenge is major. It is, however, quite clear that it cannot be handled be reading select parts of Jurgen Habermas to those concerned. The only way in which sceptical actors can be brought into the field constituted by such concepts as democratic dialogue and broad participation is, by themselves, experiencing their practical force. If some actors can be brought to proceed by dialogue and at the same time experience advances in terms of ability to

master tasks and challenges, it will carry a lot of persuasive power in relation to other actors. For new actors the choice can, however, not be a simple 'for or against' dialogue. In most cases there is a need for a stepwise adaptation and a successive testing out of what practical challenges can be better dealt with. For this reason alone, fixed criteria cannot be applied in creating learning regions (Gustavsen, 2000). Rather, in moving from established networks to new networks one may often accept forms of communication that are initially rather far from the notion of democratic dialogue. The point is not to force new actors into a pre-given mould but to expose them to certain experiences. If these experiences are seen as positive their involvement can grow, stepwise recruiting new actors to the process.

In initiating and steering processes which are to lead towards a realisation of the idea of learning region there are a number of further concerns that can be brought in. They are not 'iron laws' or principles without exception but rather points of orientation that can draw our attention to certain issues and give rise to points and arguments that would otherwise have escaped our attention.

Insofar as research or other 'third parties' are to provide support in the process, it generally seems warranted to depart from the idea of a seamless relationship between existing competences and new ones. Sometimes large organisations may be able to make radical turnarounds in products, processes and relationships, but this is rare. For small and medium sized enterprises it is even rarer. Consequently, the point is to move in where the actors are, not where they ought to be. The last is the target, to be reached over time, together. The point seems to be recognised by Amin and Thrift (1995) when they mention the potential of support systems, such as technology centres or service centres, which can help networks of firms perform in an innovative way. People closer to the actual operation of such support – i.e. Mazzonis (1998) – stress even more strongly the need to build a support system that can move in with the enterprises and not far ahead of them (in the hope that eventually they will follow). A major experience from Enterprise Development 2000 was that the dialogue with the enterprises had to start with understandings and challenges as seen from the point of view of the enterprise actors. This is 'the figure' whereas, in the initial phase, research contributions constitute a background. Stepwise, research contributions – or other forms of more advanced knowledge – can be played into the process but not faster than what the capacity of the local actors allow for (Gustavsen et al, 2001).

Much of the support even to SMEs has focussed on technology and economics. Going by the experience from several Swedish programs – such as the Work Life Fund (Gustavsen et al., 1996) – as well as Enterprise Development 2000 in Norway (Gustavsen et al., 2001) organisational dimensions have been underplayed and can to a much greater extent than commonly recognised be used as levers to achieve quite substantial results even in the short and middle run. The logical explanation of this is that such notions as region and innovation system are, in themselves, notions of organisation and 'before' there is an adequate approach to these dimensions none of the other benefits – be it technological or economic ones – can be reaped.

A special case of the seamless relationship has to do with how the arts and crafts on the one hand are positioned relative to industry on the other. When industry entered the scene there was a tendency to see it as a radical break with the crafts, not a complement to them. Even in small economies like the Nordic countries this has been the overall belief. As demonstrated not least by the recent successes of the Italian regions, this is a faulty perception and a very expensive one. Much of the rapid growth in Emilia-Romagna, and more recently in Veneto, actually has its basis in the crafts but in combination with an ability to industrialise those parts of the products that are suitable to industrial forms of production. Furthermore, much of the product development and innovation first occurs within the arts and crafts rather than the industrial sphere. An industrial innovation, where all elements, from supplies via production to customer services, need to be worked out before the first product is put in the market has generally become enormously expensive and to an increasing degree fall beyond the capacity of the small economies. 'Organic innovation', emanating from personal skills and craft traditions are much more suited to development within, say, a regional framework. Whereas Veneto has a mushrooming shoe industry with a global market, Norway, with approximately the same population and a very wealthy home market, has one domestic producer and even this is struggling.

Insofar as art and craft traditions function as forces in learning regions we are in a pre-Fordist setting rather than a post-Fordist. The notion of post-Fordism places too much emphasis on the emergent trends as replacing Fordism, to some extent they have actually bypassed Fordism.

If it is imagined that a learning region grows out of a number of smaller networks where such notions as democratic dialogue and broad participation are firmly anchored, the balance between these networks and new formations will be critical. To some extent the new formations need to learn from the older ones and one challenge is how much of a load of this kind can be placed on the existing networks. There are few answers to this question since it has been made subject to almost no research at all. Decisions need to rely on judgement but it is important to be aware of the problem and of the need to balance rate of growth against the support capacity of existing elements.

This issue leads into the more general one of the learning flows of working life. Traditionally, enterprises tended to learn by similarity; for an engineering firm with 150 employees welding pipes the demand was for another pipe welder with 140–160 employees, to match oneself against. This constitutes an extremely narrow platform for learning. To an increasing degree, enterprises have started to learn from differences; from using enterprises with different characteristics as a background against which to pose oneself (Ennals and Gustavsen, 1998). In fact, for figure-ground configurations to be at all possible, there must be some differences between the ground and the figure. On the other hand, it is always difficult to assess the degree to which learning by differences has actually become an established pattern. In a Norwegian regional network – Nordvest Forum where enterprises from a number of different industries participate – a recent generation of workplace development projects was based on grouping enterprises. One group was furniture industry only, one consisted of a truck producer

and a producer of electrical heating equipment; one of a shipbuilding group, one of a fish processing group and, finally, the most heterogeneous one, consisting of an airline, a hotel, and a manufacturer of transformer stations. The development themes in these projects covered a broad field but generally included quality, product development, production strategies and customer relationships (Hanssen-Bauer, 2001). This configuration is more heterogeneous than, for instance, the Italian industrial districts but still falls short of fully utilising the potential for differences inherent in this particular network.

The learning flows generally seem to be in an intermittent phase: on their way from learning by similarities to learning by differences but with a tendency to still keep the process within limits and seek cooperation with enterprises 'not too far away'. Again, we face a concern backed by little research and can do little more than point it out. It is reasonable to expect, however, that the development towards increased use of differences will continue and that a skilful but active broadening of the range of partners confronting each separate network member will contribute to a fruitful dynamism. A complicating factor may be that the crafts are generally more strongly internally oriented than industry. Insofar as we want to emphasise craft traditions as a learning platform we may have to weigh this against learning by differences.

The learning flows will differ between regions. In a region where strong arts and crafts traditions are present the whole movement towards more learning and innovation takes on a shape different from what occurs in contexts where the arts and crafts have almost disappeared as economic forces. It is in this last kind of case where much learning will have to emerge from actually experiencing the limitations of traditional industrial systems, generally a very expensive form of learning, but the one corresponding most strongly to the idea of post-Fordism.

The various efforts that can be launched to help promote the idea of learning region – such as conferences, mutual visits, joint projects, new supply chains and other forms of cooperation – all have a location relative to each other in time and space. Although little can be said in general about what may be 'the right' time-space configuration of the various efforts, it is nonetheless important to underline the significance of this dimension and give thorough considerations to what is the right time and place for each measure, given, for instance, what we may know about the learning flow.

These were some points of concern, there are many others. Ultimately, however, none of them ensures success. They define issues we need to look at, actions we can possibly perform, but in the end we have to rely on specific local circumstances to decide what we actually do at each and every point in time. This means that rather than make lengthy lists of points, we basically need to work in such a way that the chief guiding principle is responsiveness towards what happens, combined with a strong emphasis on connectedness as a core dimension in itself (Gustavsen et al., 2001)

Finally, one may recall that from an economic point of view, there is no special value associated with the concept of region. In this context it is a means to an end, the end being a

mushrooming population of enterprises and activities able to sustain full employment and a good income for all. If this can be reached through other configurations – say learning enterprises, learning networks or industrial clusters – there is little reason to strive for regions. When configurations answering to the notion of region still attract attention it is because this seems to be the level of social organisation where connectedness and scale can most fruitfully be combined. Even given this, region is no unequivocal phenomenon, as demonstrated by the rather different phenomena hiding under the concept. In fact, as pointed out in Ennals and Gustavsen (1998) what seems to be the case, not least in Europe, is the emergence of a whole range of new forms of organisation spanning from the micro to the macro, from the learning organisation via the small network to the supranational notion of 'economic area'. It is not a question of either-or but one of overlapping and mutually reinforcing structures. Success may be more strongly linked to the ability to master a number of different configurations and make them support each other than to the ability to push one of them towards continuously higher levels of sophistication.

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4. Local partnerships in Ireland

Tony Crooks ([26])

4.1. Introduction

In the first part of this paper I will briefly trace the evolution of national social partnership in Ireland, outline the contribution of the European Union (EU) and relate it to local economic and social development. I will go on to outline the role and the function of Area Development Management Ltd, a private not for profit company established by the Irish Government and the EU in 1992 to manage local economic and social development. Partnerships are the main delivery agencies for this work at local level and I will describe the structure and operation of a local partnership and some of the results of the work of partnerships in Ireland.

I will also outline other partnership initiatives that affect education and training agencies in Ireland.

In the second part of the paper I will suggest three of the challenges, which face education and training agencies when working in partnership with others. These are the challenge of relevance, the challenge of accepting the interdependence of partners as a method of working and challenge of facing multi-dimensional issues. Finally, I will conclude with a case study of a multi-disciplinary response to the needs of young parents and their children which involved education and training agencies and which took place in an inner city local authority housing estate in Dublin.

4.2. National social partnership in Ireland

Partnership is an increasingly important principle in the development of policy at national level and in its implementation at local level throughout Ireland.

At national level there have been a series of agreements involving the Government and the social partners since 1987. At local level the first partnerships were established as a result of a national agreement, and subsequent partnerships have been established and funded under an operational programme for local, urban and rural development which formed part of the community support framework (1994-99) and were co-financed by the EU and since 2000 under the National Development Plan (2000-06).

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4.2.1. The economic context

In recent years there has been significant economic progress in Ireland. GDP has increased at an annual average rate of 6 %. This strong economic growth has been translated into significant employment growth. There has also been a continuing decline in unemployment during this period. This employment growth has been achieved against a background of significant average annual labour force growth accounted for by:

(a) continuing strong inflows of young persons on to the labour market;

(b) rapidly increasing female participation;

(c) a reversal of traditional migration trends to a position where Ireland now has a net inward immigration.

Different commentators and analysts interpret the underlying causes of this strong economic growth in different ways. However, most agree that the factors to be included are the tightening of fiscal policy in the 1980s, improvement in competitiveness, the increasing level of average educational qualifications, the inflow of Structural Funds from the EU and the successive national pay agreements since 1987.

4.2.2. Partnership working at national level

In many ways the names of the national agreements reflect the story of Ireland's economic growth. They are:

(a) the programme for national recovery (1987-90);

(b) the programme for economic and social progress (1991-93);

(c) the programme for competitiveness and work (1994-96);

(d) partnership 2000 for inclusion, employment and competitiveness (1997-99)

(e) the programme for prosperity and fairness (2000-02).

These are much more than wage agreements. They are strategic plans, which prioritise the development of national social and economic policy. It is not just the titles and the content of these agreements that show an evolution, there is also a widening of the process by which the agreements are reached.

The early agreements were between the 'traditional' social partners i.e. business organisations, farming organisations, the Irish Congress of Trade Unions and the Government. In 1996, 19 organisations were present at the opening discussions and the agreement was negotiated and ratified by the community and voluntary sector. In the intervening years, representation from the other social partners had also been widened.

In relation to national social partnership agreements principles such as consultation, working to a shared understanding, problem solving, interdependence, participation and ownership all underpin the approach to partnership at national level.

4.2.3. The role of the EU in encouraging partnership

Ireland has been a major recipient of EU Structural Funds through the Community Support Framework. However, to characterise this relationship mainly in terms of funding is to vastly understate the influence of the EU in Ireland.

The EU has consistently encouraged approaches to partnership and to subsidiarity by which I mean the devolution of decision-making. A consistent theme in all EU policy papers is that of social solidarity and a better quality of life for all the citizens of Europe. This commitment finds its form in many different ways; combating unemployment, fighting literacy problems, encouraging free movement, encouraging the equivalence of qualifications, etc.

Approaches to partnership and subsidiarity are central to the EU Community Initiatives such as the Leader Programme and Territorial Employment Pacts. The special support programme for peace and reconciliation in Northern Ireland and the six border counties in Ireland use global grants and intermediary funding bodies as the main source of implementation. This is subsidiarity in practice, when small communities can directly access new funding for their own projects provided they fall within the parameters of the programme.

In many ways, the EU mentors a partnership approach and enhances national policy and encourages greater links and synergy between policy in Ireland and other Member States.

4.2.4. Approaches to partnership at local level

In 1994 the two strands – EU involvement and national agreements – were successfully combined. One of the four priorites of the community Support Framework (1994-99) was a new Operational Programme for Local Urban and Rural Development. The Government designated 38 areas as disadvantaged for the purposes of the Programme and agreed on a partnership structure for each area.

A partnership company, legally constituted under the Companies Act and limited by guarantee, was established in each area. The partnership Board of directors was drawn at local level from representatives of:

(a) the social partners (the employers, trade unions and farming organisations, where appropriate);

(b) state agencies including local authorities;

(c) community and voluntary organisations, active in economic and social development;

(d) elected representatives.

The purpose of the partnership is to develop an understanding of the needs of the area and of the target groups of the Programme and in particular those people who were long-term unemployed or socially excluded. Based on this understanding each was asked to develop a shared vision of how these needs might be met and to outline this in a strategic plan for the area. This plan was then submitted to ADM (the intermediary company established by the

Government in agreement with the EU to manage local social and economic development in Ireland) and appraised by it. On the basis of the appraisal, funding was allocated towards the strategy of the plan. This funding was then made available to the partnership to implement the plan.

The measures which are eligible for financial support are broadly defined as:

(a) enterprise creation and development;

(b) environmental small-scale infrastructural works;

(c) services for unemployed persons;

(d) community development;

(e) education to prevent early school leaving;

(f) second chance education and training.

Actions are targeted at the areas within the catchments of the partnership, which are most in need e.g. depopulated rural areas or local authority housing estates in inner city or suburban areas. Actions are also targeted at the people who are most excluded. This will include those who are long-term unemployed, young people at risk, lone parents, Travellers, asylum seekers, etc. Partnerships and Community groups also contribute to the coordination at local level of mainstream programmes as they affect those who are socially excluded. The actions of partnerships should add value to what is already provided, they should plug any gaps that may exist at local level. Where possible actions should be innovative rather than the delivery of services. The emphasis should be on innovation and on learning lessons from the local experience, which in turn can be used to inform the development of policy at local and national levels.

Just as important as what a partnership does is how is sets about carrying out its work. This is a process of strategic planning involving consultation and listening to its clients and the people who live within its catchment area. It also involves negotiation and agreement leading to collective decision-making. This happens because the partnership process reflects the interdependence between the partners with no one sector able to fully achieve its goals without a significant degree of support from the other sectors. In turn this also leads to the joint ownership of the decisions.

During the period until December 1999 some 34 000 people set up their own business or were placed in employment by partnerships. Some 17 500 people who were previously long-term unemployed set up their own business. Almost all of them were sole traders. They received mentoring support and advice from the partnership and then registered with the Department of Social, Community and Family Affairs under the Area Allowance Enterprise Scheme. A further 16 500 were placed in full-time employment. The Local Employment Services, which was piloted by partnerships before being mainstreamed by the Department of Enterprise, Trade and Employment operates in 23 for the partnership areas. The targeting of these services at those most in need is of great importance. Some 25 000 of the 34 000 people placed in employment or who set up their own business were long-term unemployed i.e. on the live register for more than 12 months. This includes almost all who set up in

self-employment and 49 % of those placed in employment. A further 27 000 adults participated in complementary education or employment training. Some 71 000 young people participated in some form of educational initiative to prevent early school leaving. Finally partnerships supported over 3 000 Community Groups and contributed to some 1 300 infrastructure and environmental projects during the lifetime of the programme.

In addition to the partnership Programme which continues under the National Development Plan 2000-06, there are many other 'partnership' initiatives which also affect education and training agencies. There are the partnership initiatives carried out as part of the E.U. Community Initiatives e.g. URBAN, Leader, Horizon, there are the Territorial Employment Pacts, other initiatives funded by the Irish Department of Education and Science which involve a partnership or district approach. There is also the Integrated Services Process which was piloted in four for of the most deprived blackspot areas in Ireland.

4.3. The contribution of partnerships to an understanding of a learning region

The Cedefop discussion note refers to the features of a learning region as 'Involved in collaborative learning activities' or as a 'collective process to produce an outcome that is in the interest of all concerned and which top-town and bottom- up development form a dialectic'. It also refers to 'interactive learning' and to 'social and organisational learning' which entails:

(a) identifying new roles to be played by existing education and training and agencies; and/or

(b) creating new agencies for the promotion of this kind of learning.

Education and training agencies which undertake partnership activities are involved in this new ' social and organisational learning'. Participation involves undertaking new challenges for educational and training agencies. These challenges tend to be inter-related and to be inter-dependent.

4.3.1. The challenge or relevance

One of the continuous challenges facing agencies is that of relevance in an environment that is constantly changing. There is an increasing emphasis on teaching skills and competences, learning how to learn is sometimes considered as important as what is learned. Courses which are devised centrally are less likely to be relevant in each region. Vested interests often argue for the status quo. New partnership arrangements tend to be more local, more immediate and more likely to be based on needs. Since the partners are likely to represent a variety of viewpoints, issues of relevance and responding to local needs are likely to be high on the agenda. The challenge of relevance for education and training agencies is one of being able to justify the programmes and initiatives which are provided in an open and transparent manner.

When this happens, the other partners accept that the programme/initiative is relevant and offer support for it. Thus it becomes locally owned with each partner committed to its success.

4.3.2. The challenge of accepting the interdependence of partners as a method of working

The structure of partnership initiatives encourages organisational learning. The partners coming together is recognition of the interdependence between them. The partnership process is necessary because no one party can achieve its goals without a significant degree of support and commitment from others. Each brings his/her own perspective to the issues under discussion, each has much to contribute and equally important, each has much to learn from the others. This coming together in partnership is a learning exercise in its own right.

The rationale for coming together in partnership is for each partner to develop a shared vision for the development of the initiative. This will involve an identification of the social and economic needs, an analysis of these needs, agreement on a set of objectives and on a strategy to achieve these objectives. This process is a way of working and the result of this process is a strategic plan for the shared initiative.

The process of how people learn how to work together is also of great importance. Adopting problem solving approaches, working in collaboration to achieve agreed objectives, participative methodologies, consultation, listening to others, being inclusive are all characteristics of the learning region. The process involves negotiation and agreement between the partners leading to collective decision-making. This in turn leads to joint ownership of the decisions. For many used to hierarchical situations in more formal education and training agencies, this method of working is new. It involves acceptance that no one agency can deliver on all aspects of the solution to any issue and that partners are interdependent.

4.3.3. The challenge of facing multi-dimensional issues

Education and training agencies also need to recognise that many of the issues which they face are of a multi-dimensional nature. Issues related to the curriculum and to the organisation and ethos of the agency are for the most part within its control. Issues related to wider socioeconomic factors are outside the immediate control of the education/training agencies. Early school leaving is often a symptom of wider problems. Multi-generational problems from unemployment to drugs to the standard of health and housing are all fundamentally linked. Therefore the response to tackling these issues must also be holistic and aimed at addressing all of the issues that contribute to the problem. In partnership arrangements it is more likely that the response will be holistic and therefore it is more likely that it will be successful and sustainable.

The Irish Governments National Anti-Poverty Strategy states:

The causes and consequences of poverty are often inextricably linked. In the worst scenario, this can result in a cycle of poverty, which has sometimes been described as ' a vicious circle of poverty'.

For example, a child of unskilled working-class unemployed parents living in a disadvantaged suburban housing estate has a particularly high risk of poverty. He/She is more likely to leave school early without educational qualifications, is more likely to remain unemployed and see little chance of getting a job, is more likely as a consequence to become involved in substance abuse and crime, particularly if his/her peers are in a similar position. While this is an extreme example, there are undoubtedly areas where this is occurring in Ireland. This cycle of poverty must be broken, otherwise some individuals and groups of people will become further marginalised and alienated from the rest of society. This will hold back economic development and subsequently result in increased costs and security risks for the rest of society. In breaking this cycle of disadvantage attention must be primarily focused on addressing the main structural causes while not ignoring ameliorative actions, otherwise, we as a society will be unable to address poverty substantially.

The kinds of issues outlined in the National Anti-Poverty Strategy are multi-dimensional in nature and face educational and training agencies. Partnership type initiatives are more likely to be successful in addressing these issues in a way that is long term and sustainable.

4.3.4. A case study of a partnership initiative

This case study took place in an inner city local authority housing estate in Dublin. It involved the coming together of the community and a number of statutory agencies as partners to address a number of specific issues. In it, the partners accept the challenges of relevance, interdependence and the multi-dimensional nature of the issues which they face. The key issues which the community agreed needed to be addressed were the needs of young parents and their children who lived in the estate. One part of this was to address the issues of early school leaving. The community together with a number of statutory agencies agreed that since the issue had many dimensions the response to early school leaving needed to be integrated one. The specific objectives of their response were as follows:

(a) to provide a Crisis Intervention Programme for pupils at risk of imminent expulsion from school

(b) to establish a preventative programme for children aged 8-12 at high risk of drop out from school

(c) to provide a preventative support programme for all children aged 4-8 years

(d) to develop a linkage programme between primary and secondary level education

(e) to provide a Healthy Eating Programme for all children in the estate.

In this Case Study I will deal with the response to the first objective the Crisis Intervention Programme and the last objective the Healthy Eating Programme.

4.3.5. The crisis intervention programme

This programme was necessary because of a number of particular circumstances. At the beginning of the school term there was a complete change in staff including a new principal and all the teaching staff of the school. The premises of the school were highly unsuitable and there were a large number of children in attendance who were identified as having particular special needs.

The partners who came together included representatives of the school, the local health board, the Department of Education, the school attendance officer, the local community and a youth project.

As a result of a number of actions which were undertaken by the partners, each of the children in the target group was supported to stay in school until places became available in special schools. The school premises were refurbished. Two additional childcare workers were assigned by the health board on a part-time basis to support the programme and to work directly with the children. An educational psychologist from the Department of Education provided a consultancy and referral service. The Department of Education provided special teacher hours and classroom assistants.

At the end of the school year, the school principal was able to state 'Our school was in crisis at the start. With the cooperation of all the agencies involved at a local level, we have turned the school around and there is now light at the end of the tunnel. Staff are willing to stay, the atmosphere has changed and we feel we are not alone.'

4.3.6. The healthy eating programme

Teachers in a number of schools in the area have expressed concern that children were coming to school without breakfast. This lack of food affected their progress in school. As a result of this identified concern and in consultation with the local community a food and nutritional education programme was developed. Finance was secured from a local charity and over 200 children now avail of the food programme in three schools. There has now been a noticeable improvement in the children's attendance at school. Teachers agree that there are improved participation levels and many of the children are coming to school earlier. A state agency has now taken over the funding of the programme which is on-going.

4.4. Conclusion

Both examples are small in scale, but taken together with other activities to achieve the other objectives provide an integrated response to the problems of early school leaving in one deprived urban local authority housing estate. The problems of early school leaving in turn are linked to other problems of young parents and their children, which was the agreed priority issue for the community. Education agencies on their own could not have achieved these results. Educational agencies working in partnership with the local community and with other agencies did achieve an integrated multi-dimensional response. The response was certainly

relevant to the needs of the clients in this case, young people at school. Finally the case study illustrates the interdependence of the partners. It was only by developing a shared vision, an agreed approach to solving the issue and through working in collaboration with each other that they were able to address all the different aspects of the problem simultaneously. This is partnership in action where working 'together' is better than working 'alone' and where working 'with' people is better than working 'for' people.

5. ICT – Supported innovation in regional training systems

Claudio Dondi

5.1. Introduction

This paper explores the different ways through which ICT can support innovation in education and training systems at regional level. The first part outlines a major innovation project (J100-Regiones) undertaken by the Regional Administration of Emilia-Romagna, Italy in the framework of the ADAPT initiative of the European Union between 1995 and 1998. The purpose of this project undertaken by the Department of Employment, Education and Training of the Regional Administration was:

(a) to improve the capacity of the training system to respond in an effective and flexible manner to the information, training and consultancy needs of actors in the local economy, with a special focus on SMEs;

(b) to promote a federation of regional education and training providers linking them with research institutions and SME service providers, and to involve enterprises in the direct provision of training;

(c) to develop a new generation of transnational partnerships with eleven other Regions in Europe through establishing a solid infrastructure for collaboration and long-term relationships among organisations with similar profiles.

The J100-Regiones project is of interest from the following different points of view:

(a) its integration in Regional development policies, its strategic orientation combined with its bottom-up approach;

(b) the level of involvement of different local actors in a common effort to provide information, training and advice to SMEs;

(c) the role assigned to enterprises in the design and provision of training;

(d) the transnational cooperation model, which generates significant outputs and a shared learning culture among all actors involved in the regions of the twelve partners. ([27])

([27]) A synthesis of this project was published in Nyhan, Barry; Attwell, Graham; Deitmer, Ludger. *Towards the learning region: Education and regional innovation in the European Union and the United States*. Luxembourg: Office for official publications of the European Communities, 2000. (Cedefop Reference series, 3006).

The second part analyses the specific role played by ICT in the project development and attempts a generalisation also in view of matching ICT with the six key messages of the European Memorandum on Lifelong Learning, with a special focus on the regional dimension that is at the centre of both the Agora and the case presented.

5.2. Emilia-Romagna – The regional context

Emilia-Romagna is one of the large Regions in Northern Italy, known for its cultural heritage and dynamic economy – based on SMEs – with an international profile and high exports. Emilia-Romagna has nearly four million inhabitants and is divided into nine provinces.

The Emilia-Romagna industrial sector has been studied since the 1970s. It is seen as a place where two models of exponential growth of SMEs were developed: the 'imitation' model, which applies to knitwear, ceramic tiles, footwear and tourism, and the more sophisticated 'integration' model, relating to automatic packaging machines, car and motorbike components and agricultural machinery. Both models generated a number of highly specialised 'industrial districts' across the Region, where the main actors comprise thousands of SMEs. Similar kinds of industrial development where also observed in other parts of Italy (North-east and Adriatic regions). Emilia-Romagna was also seen as a model of vigorous economic development to be replicated in other parts of the world.

The industrial associations and the Regional Administration ('left wing' since the end of the Second World War) through a paradoxical process of political confrontation and practical collaboration, managed to cooperate to build a capillary service infrastructure for the myriad SMEs in the region. This was in response to the shared view that SMEs were not able, on their own, to benefit from research results or to open new markets and adequately train their staff. A network of sectoral, and later on, horizontal service centres were created in the 1970s and 1980s by ERVET (the Regional Institute for Development, involving the Administration as the major shareholder with the Regional Banks and Industrial Associations) to support SMEs in carrying out a range of functions that only a large enterprise could develop internally. A virtuous mix of collaboration and competition has characterised the behaviour of Emilia-Romagna's SMEs since that time, resulting in the construction of a surprisingly cohesive systems.

5.3. The evolution of the regional training system

At the end of the 1970s, the legislative and administrative competence for vocational training was transferred from the Ministry of Employment in Rome to the Regional Administration in Emilia-Romagna. At that time the training system was comprised of a very traditional set of vocational training centres, run by Labour Unions and Catholic Organisations to provide basic

professional skills for young people (aged 14-16) who had not completed upper secondary education.

However, in the 1980s and 1990s, there was a shift of focus towards continuing education and shorter courses for young people to assist them make the transition from school (or university) to work. Several hundred teachers and trainers went through re-training programmes to enable them to carry out these tasks. This entailed major investments in people and materials. Equipment was renewed and tools for training-needs analysis, organisational development, quality assurance were purchased for the training centres. All of this was accompanied by an ongoing review and evaluation. Rolling plans in the form of Regional Directives were drawn up every three years and short terms goals were defined every year. A high priority was given to the topic of regional policy-making, including the setting up of a high level coordination committee for training, with the active participation of the social partners from both sides of industry – employers and trade unions.

Already at the end of the 1980s, Emilia-Romagna was being cited as a region that had succeeded in transforming an ancillary social service into an active labour market policy tool. Many training organisations and consultancy organisations, which had participated in the innovative processes of that period, later became very active on the national and European scene. However, from a negative perspective, with the training system becoming rather content with itself due to the positive feedback it was receiving, there was a danger that it would become complacent. There was also a tendency in the region to begin to look inwards and evaluate its performance according to its own sometimes rather 'closed' reference criteria. When the Regional Administration became aware of this risk, it introduced Regional Directives during the years 1994-97 to encourage more self-critical reflection and much more active cross-institutional collaboration between training organisations, research and educational bodies, and also very importantly, including enterprises in the design and implementation of training policies actions.

5.4. J100-Regiones in Emilia-Romagna

When the European Union ADAPT programme appeared, the Regional Administration realised that it was an excellent opportunity to implement and strengthen the innovation actions mentioned above. Given the legal competence of Italian Regional Administrations in the field of training, most of the ADAPT funding was attributed to them directly. The Emilia-Romagna Regional Administration decided to reserve about 30 % of the ADAPT founds available to the region to establish a major meta-project (costing over EUR 10 million) with the view to encouraging collaboration between different entities to provide information, training and consultancy to local enterprises.

In order to balance this top-down approach with a bottom-up initiative, an open call for proposals was launched, that required the setting up of a significant 'pool' of organisations to

participate in the programme, in particular, to design and introduce a range of actions involving 'user' enterprises.

The result was the approval of 17 training innovation projects involving more than 400 organisations in the Region and distributed across many industries. In a sense, training organisations were obliged to collaborate in order to get funding.

This should be seen in a very positive light, however, as bodies which had never exchanged information in a serious way before, found that they shared common interests and began to become aware of their respective strengths and weaknesses. Hundreds of enterprises became active in joint innovation and group learning projects. Several ad-hoc consortia also, established as a result of the call for proposals, began to play a key role on the national and European level. Two other important innovations supported by the ADAPT project were the systematic use of ICT – a large intranet was set up where all the information relevant to the individual projects was available – and the development of a comprehensive evaluation system, dealing with administrative, technical, and socioeconomic aspects of training.

5.5. ICT in the Regiones project

In the years when the Regiones project was in place, internet penetration was growing rapidly in Italy, especially in enterprises, so it is not appropriate to attribute the merit of ICT diffusion in Emilia-Romagna participant organisations to the project itself. What is certain, however, is that the project provided not only resources and competencies, but also a structured and meaningful environment to initiate a significant amount of people to technology-supported communication.

ICT was used in many ways by Regiones:

(a) to diffuse information from the Regional Administration to project participants;

(b) to collect and diffuse information on results and events organised by the regional projects, within and outside the Regiones community of actors;

(c) to exchange administrative data between the Administration and the 17 project managers;

(d) to monitor and manage the programme implementation, by collecting objective information on project development and evaluative information from participants and user, so contributing to build a culture of transparency and formative evaluation across the Programme;

(e) to support transnational activities, between meetings of trans-national working groups: e-mail audioconference and, to a smaller extent, videoconference were systematically used to present progress of activities, to exchange views on priorities to come and to plan future steps among the participants in the 12 European Regions associated in the Regiones-ADAPT scheme;

(f) to familiarise SMEs with commerce, as part of spin-off activities of transnational sectoral groups, in which SMEs representatives were particularly active;

(g) to stimulate participation and dialogue among all actors involved, so overcoming traditional, hierarchical and bureaucratic formalities in communication within the system and generating a more creative social environment among the Administration, training organisations, enterprises and other involved actors.

Obviously ICT were also considered a useful tool to be used within training activities, but this was no new thing in Emilia-Romagna, where open distance learning started to develop in the 1980 and a systematic effort has been undertaken by the Regional Administration to support the development of ODL materials by training organisations, the activation of a Regional Resource Centre for ODL accessible to all training bodies, the experimentation of a certification system for ODL products and services (Cerfad). The level of commitment to ODL is so strong that in 1997 Regional Directives for training the obligation was introduced, for any training organisation which asks for public money to conduct continuing training, to demonstrate its capacity to deliver open and distance learning.

A considerable number of learning resources to be used off-line or, increasingly, online were developed by the ADAPT projects and ODL became a systematic theme for transnational exchange of experience, but what is most important to remark is that the Regiones scheme itself was able to create a regional learning community also thank to its systematic use of electronic communication in a number of project activities, not only classic training. It was thanks to intense communication flows, not really thank to storage of multimedia resources, that motivation to learn with the help of technology became strong enough to support the creation of this regional community.

In fact, much of the Regiones added value can be recognised, after a few years, in the establishment of new communication flows and new partnerships (regional and trans-national) among organisations and people who discovered to share problems and approaches, but who had never really communicated among themselves before in a similar way. Learning from comparisons, discovering unexpected commonalities, working together to produce a common result, starting together to use ICT, comparing and discussing evaluation results were all parts of a comprehensive learning experience which did not leave the regional training system unchanged.

Closer relationships with enterprises and taylor-made design of training, better relationships with schools and universities in the region, increased use of technology, increased habit to work transnationally and, above all, new regional partnerships among training organisations and other actors were the main results of the project.

5.6. One lesson learnt from the project: the role of ICT in lifelong learning

The idea that ICT may contribute to implement the European lifelong learning agenda is certainly not new, and not difficult to argue, but what Regiones can help to understand is that the community dimension that communication technology can support is by far more important than the magnificent qualities of multimedia stand-alone interactive products in generating favourable conditions for the emergence of a 'learning region' environment. The interactivity between people – facilitated by communication technology – is a real factor that can motivate adults to undertake and continue medium and long-term learning paths.

If we take a look at the recent European Memorandum for lifelong learning, it is not difficult to find a role for ICT at regional level by considering each of the six Key Messages:

KM1: New basic skills for all

ICT are both a large part of the new basic skills and a tool to guarantee the broadest access to all the basic skills required in the knowledge society. Access to ICT is recognised to be a major factor of social inclusion policies at regional level.

KM2: More investment in human resources

ICT is a key component of the social, organisational and individual investment in learning; it may facilitate the adoption of an investment approach in the education and training field through capitalisation of learning resources and communication infrastructure and, to a certain extent, modifies the whole economics of education and training. learning regions should identify the required investment on ICT to support their long-term development.

KM3: Innovation in teaching and learning

ICT offers a huge variety of options to innovate teaching and learning methods: it pushes towards more individualised user-oriented learning, it allows to implement constructivist approaches in a world very rich of potential resources, but especially it allows to integrate learning into the home and the workplace and to develop virtual communities of learners.

KM4: Valuing learning

Modern knowledge management systems, combined with virtual learning environments through competence management systems, can provide manageable tools to accompany the process of appreciating and recognising non-formal and informal learning, particularly within organisations and in the context of a Regional network committed to learning.

KM5: Rethinking guidance and counselling

ICT may play a fundamental role not only in making information on learning and employment accessible everywhere, but also in developing new forms of guidance and counselling, based on mutual support of peers and on autonomous individuals able to orient themselves and to find the relevant support in the regional guidance system.

KM6: Bringing learning closer to home

The relevance of ICT in this case does not need to be explained: the potential of technology based learning to reach remote and scarcely populated areas is well known, but 'closer to home' should not mean 'in isolation'. The 'community building' potential of communication technology should be used to reduce the feeling of remoteness and isolation that classic distance education was likely to maintain. Local resources centres, but also systematic encouragement and structuring of collaborative learning may help to keep a social dimension in ICT-supported learning. The Regiones experience shows that this is also true among organisations, not only among individuals.

6. South-east Europe and the learning region

Bernd Baumgartl ([28])

The present paper tries to extend a recurrent discussion within the European Union which prompted the holding of Agora XI, to south-east Europe (SEE) ([29]). Its starts out with considering the suitability of the concept – and its needs for adaptation – for the specific situation in south–east Europe. This includes questions on its applicability, some conceptual suggestions, the factors and actors of regional learning, and an investigation of the potential such concept could have as a (additional) source of identity in SEE.

Part two attempts to give some insight into developments in south-east Europe. After describing general trends in reform and development, it proposes a sample of different subregions which – according to their current situation – could be eligible to qualify as (future) learning regions:

Part three is tagged with the main objective many international, national and regional initiatives try to achieve – not least by means of one of the largest and broadest international policy initiatives (a Pact) for a region: stability. Asking the preliminary question if the result of activities will bring about a 'learning Balkans', is followed by a list of constraints and conditionality to enable such development. The realistic first goal is economic reconstruction, but it is argued that the concept of learning region could be of high potential if learning as a entire region take place, and learning regions emerge within south-east Europe. This means, amongst others, both a focus on human resources, democratic citizenship and governance, and a de-ethnicisation of ties and cleavages.

As an indication that more information and more thinking are necessary, but also to complete the series of Ss, conclusions and recommendations follow in the form of suggestions (for discussion). These were enriched by hoped-for contributions from Agora participants. However, the applicability – and indeed application – of the 'learning region' method to achieve socioeconomic development seems to be both secondary at present, and crucial as one of many long-term visions for south-east Europe.

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([29]) South-East Europe is preferred in this paper to the term 'Balkans' given the latter's loadedness with pejorative connotations.

6.1. Suitability

6.1.1. LR applicable to Balkans?

The terms Balkans and Balkanisation have become somewhat careless speech for referring to chaos, dispersion, and war. This common notion of the Balkans, although originally relating to an innocent mountain chain in Bulgaria, seems to be radically opposed to the idea of a peaceful cooperation of different regions, which all engage in intensive and reciprocal effort to boost socioeconomic development. Paradoxically, when asked if they perceive themselves as a Balkan people or country, very few of those regularly labelled Balkans refuse to be a part of it. Apart from Bulgaria, most regions, people and countries prefer or at least can live with the term south-east Europe. This preference is picked up in this paper as well.

A further starting puzzle to be clarified is the term region: while in the EU-jargon learning region refers to parts of Länder, districts, or even municipalities, in the case of south-east Europe and the terminology of the Stability Pact 'regional' is used as the upper level above national. Regional initiatives in fact include cross-border features or even the cooperation of several countries in one project or programme. Needless to say, between the 'Balkans as region' or 'Regions in the Balkan' the regional learning discussed at the Agora hints at subregions within south-east European countries.

Another question is, what is the appropriate degree of centralisation in the context of industrial reconstruction and policy in SEE? The basic advantage of centralisation results from internalisation of external effects. While most of the literature stresses the superior information of regional authorities as a countervailing force (and hence the need for economic cooperation between SEE countries), the present paper raises another argument in favour of decentralisation: delegation of authority to regional governments will improve the position of the home country in the policy game with a foreign government. According to recent studies, delegation can be shown to be profitable if the domestic industry comprises at least twice as many firms as the foreign industry.

We can measure socioeconomic progress in several ways. One is to compare contemporary achievements against historical statistics. Another is to compare production figures among the Balkan states themselves: when we do so, we can cautiously draw comparisons between change in the various socialist states and change in Greece, which went through a totally different 'Free World' experience during the forty years of the Cold War. Finally, we can look for signs of fundamental change in social structures and practices. There are few more striking measures of social change in the Balkans than changes in the status of women (Muco, 2000).

In contrast, significant changes from longstanding norms are easier to find in the area of Balkan socioeconomic development, than in the world of politics. No matter how discouraging the repetition of Balkan crises and nationalist enthusiasms appears, one must remember that the inhabitants of the Balkans today have access to better food, transportation,

industries, health, and personal goods than at any time in their history. There is room to hope that the satisfaction of basic human needs and wants can help blunt political discord.

Finally, there is one feature all regions in south-east Europe share: the need for increased socioeconomic competitiveness. While in some areas there is definitely competition looming ahead between different regions in SEE (e.g. tourism), it is also a safe bet that enhanced capacity, performance and production in a (at least European) market points to a rich potential for exchange of relevant experience between these subregions.

6.1.2. LR factors: citizenship, governance, expertise

In the EU, the three categories of actors involved in regional learning (Local Government – Firms – Educational institutions), correspond to three policy factors which currently much discussed in the reform process in the EU itself: citizenship, governance and competencies.

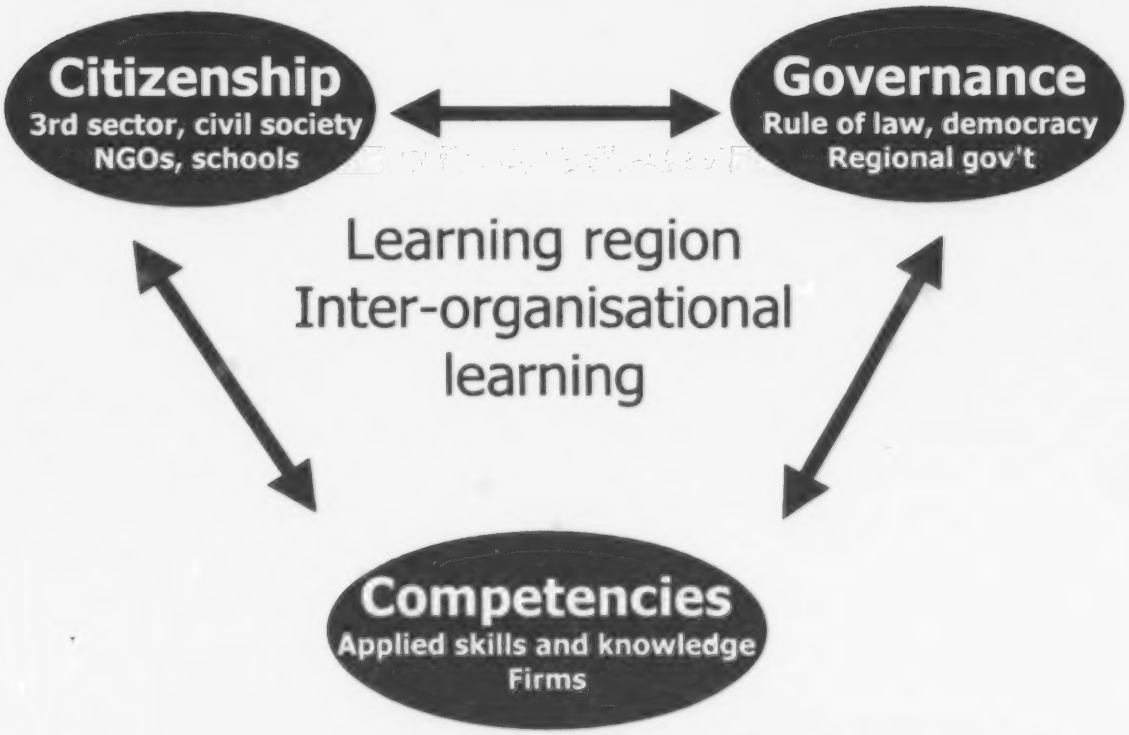
Citizenship refers to participation of individual citizens and their associations in the affairs of the state. In other words, the growing importance and influence of the so-called third sector, or civil society in the shaping of policies, not least the discussion on European citizenship and its implications for European (EU) policy-making. Relevant actors in this area are educational and training institutions, schools, and NGOs.

Governance, and second key discussion area in the EU, generally refers to the Rule of law, democracy and transparency of decision-making. Relevant actors in this area are regional, municipal and local authorities.

Competencies, in the sense of expertise, applied skills and knowledge, are necessary to select the issue or sector around which the learning region may mobilise, but also is a pre-conditions of knowledge on the side of actors. Relevant actors in this area are economic and commercial actors, like firms, enterprises, factories, etc.

All these, both in general and specifically in SEE, is being shaped and conditioned by a 'Cultural Background': values, assumptions, and traditions. They influence also the way in which action can be initiated. The following scheme summarises the areas and pillars a learning region needs to be built upon (Figure 1).

Figure 1: The learning region – Conceptual suggestions



6.1.3. LR actors: competence, power, resources?

Perhaps most decisive starting prerequisites for initiating regional learning – according to the case studies from the EU presented at the Agora – is the necessary starting initiative taken by an institution. Even more, there needs to be even an individual leader personality who initiates action. Thus, initiative is the both the key motivation in the EU, and they decisive lack in SEE.

This lack of initiative in SEE (and perhaps in all transition economies) can be attributed to a range of causalities. It is, firstly, a legacy of the previous system, where personal initiative was secondary to top-down decision-making by the party or state. Personal or local initiative were radically opposed to the ruling assumption of equality and homogeneity of society. They were rather punished than encouraged. At least two generations of citizens have grown up in such initiative-hostile conditions, and this has severely influenced their attitudes and behaviours. Restoring self-confidence and empowerment to take initiatives hints to the importance of education and training for overcoming this prevailing legacy of inertia.

The second key factor for action is the required competence, i.e. to have the right, power and resources, to start social, economic, political and civic development. Applied to the SEE case(s), this implies the question who the related actors for triggering regional learning could be. All of the three actors usually referred to in the context of the learning region (Local Government – firms – educational institutions) are characterised by a distinct development state, as opposed to the EU. Often due to a limited state of de-centralisation, local and regional actors do not have the legal authorisation to decide about their development, let alone manage their development themselves.

In general terms, it is safe to state the following on the competence of potential actors in SEE: some initiative amongst these actors is present, little power can be deployed, and most resources are absent. In conceptual terms, this means that the specific definition of Learning needs to be adapted. Such adaptation is desirable – because the concept can be of particular use in the Balkans, if it is specified with a trans-ethnic component.

While the learning region has been advocated often in EU policies, and despite large regional policy expenditures, regional inequalities in Europe have not narrowed substantially over the last two decades, and by some measures have even widened. Income differences across States have fallen, but inequalities between regions within each State have risen. European States have developed increasingly different production structures. And (EU) European regions have also become increasingly polarised in terms of their unemployment rates (Puga, 2000).

6.1.4. LR source of shared identity

When learning regions become active, it is the regional actors' initiative and interaction, and the mutual, reciprocal and synergetic inter-Learning between institutions and organisations to foster joint development. This is also possible, and occasionally already the case, in SEE. A further feature of learning regions, as it was observed in the EU cases, is the rallying around a binding socioeconomic theme or potential, which provides the over-riding motivation for action. Such themes do exist in many parts of SEE.

Moreover, instead of regional competition (i.e. 'dumping' via lower labour costs, lower standards, or lower quality levels between regions), it could be observed that a variety of learning regions results in enhanced competitiveness in absolute terms (i.e. competitiveness on the all-European or global market). Regional learning is not a zero-sum game. At the end, by improved quality of production – and quality of life – all regions are better off. The same can be observed as a potential in SEE, where only several regions could ensure the learning of the whole area of SEE.

However, there is one feature by which regional learning in SEE is different from the EU: it is the very concept of a region. In the EU, it could be observed that the results and successes of regional learning means a unifying factor, and a source of identity (regional, socioeconomic identity). This is rarely the case in SEE. In SEE one single source of identity is still prevailing, and thus defining regional belonging or not-belonging: ETHNIC cleavages and ties. This is

the reason for the potential strength of a critical mass of learning regions in SEE. Identifying with the learning region based on socioeconomic progress and success could moderate or counteract to the strongest and often unique source of identify, i.e. ethnicity.

Redefining learning regions as not necessarily ethnic region opens up for proposing a new source of identity. In other words, the non-ethnic source of regional identity could relegate the predominating importance of ethnicity as tie or divide between (ethnic) regions.

6.2. Situation

6.2.1. General trends: reform and development

When trying to describe socioeconomic trends and developments in SEE, it is indispensable to differentiate between three diverse Balkan regions:

(a) NATO/EU Member States;

(b) the accession countries;

(c) former Yugoslavia.

NATO/EU countries in SEE are Greece and Turkey. The accession countries in SEE are certainly Bulgaria and Romania, possibly also Slovenia, and perhaps even Hungary (the latter two frequently refuse to be subsumed under the title of SEE, and would surely oppose the denomination Balkans). Whereas the former Yugoslavia and its neighbours comprises Bosnia and Herzegovina, Macedonia (Fyrom), the Republic of Yugoslavia (i.e. Serbia, and still Montenegro, perhaps no longer Kosovo), Croatia (who would again raise firm objection to being called Balkan), and Albania.

Each of these groups deploys notably diverging socioeconomic development features, and thus also diverse potential for regional learning. Without going into too much detail, it can be stated that learning regions exist already in Greece and Turkey's most developed parts; that many accession countries are underway – not least with partial financing by the Phare programme, and in preparation for the ESF funding to be available as of the moment of accession – to develop learning regions. Least is the potential currently in the former Yugoslavia, where economic reconstruction is still the overriding aim, and ethnicity is still the unique source of identity at the regional level.

A substantial study could arise from the attempt to verify these statements with the help of indicators, and data from the three subregions and the countries they consist of. Testing the strength of the three groups of actors (local government, firms, schools), calibrated by the three areas mentioned above (citizenship, governance, competencies) would provide several advantages: it would allow to analyse the level of development, to point out the state of de-centralisation and subsidiarity, and to assess the necessary training and support needed in

order to initiate regional learning. While it is true, that both professional and cultural issues influence the quality and quantity of initiative and resources, it is also true that professional questions can be addressed via a prioritised policy of human resources development. However, professional development and success, and interaction with other regions would inevitably impact also cultural factors. Learning regions would simply shift the focus of attention away from ethnic tensions to more peaceful – and more profitable – issues in the sphere of socioeconomic development.

This can be already found in some of the regions listed below:

6.2.2. Existing learning regions?

Istria (Accession)

A region of multi-cultural history, at the cross-roads of three prevailing cultural influences (Slavic, Latin and Germanic), Istria today touches three States (Croatia, Italy and Slovenia). It has benefited from a substantial increase in identity – and prosperity – since the short-lasting troubles of the early 1990s. Tourism as the rallying motivation and economic factor (the northern Tuscany) has revived a genuine Istrian identity which is non-ethnic, but exclusively geographic. Even more, in the last census several of the inhabitants preferred to classify themselves as Croatian, Slovenian and Italian Istrians, rather than according to their ethnic affiliation only. A notable group simply called themselves Istrians.

Suceava (RO)

This region in northern Romania, on the border with Moldova, is characterised by a genuine regional development initiative. Building on previous Phare and Tempus projects, a virtual platform has been established, which links commercial initiatives, services and investors. The region is inhabited by a mixed population, but promotes the picture of a joint development under the regional (i.e. geographic) culture as the unifying factor.

Macedonia (FYU)

At the time of writing, the Former Yugoslav Republic of Macedonia (Fyrom in the EU) yet a state, yet the size of a region, is a double-faced example of regional learning. Until recently, it has been the only part of former Yugoslavia which managed to avoid ethnic divide – despite its precarious economic situation and suffering from the neighbouring wars. National civic identity – and the realisation that a war would be particularly disastrous – has been so far stronger than the unifying force of ethnic belonging. It is a potential example of civic state – but given the current emergence of Albanian fighters in the territory around Tetovo this may change. As a region, Macedonia is in high need of support to avoid blood-shed, and to promote regional development. The surprisingly fast reaction of the EU gives ground for the hope that the international community has started to learn its lesson from the Balkan Wars.

The combination of political involvement, and massive economic aid, coined with the provision of not-to-far start of a process of rapprochement to the EU, seem to have avoided the worst for the moment.

6.2.3. Emerging learning regions?

Pirin Region (BG/EL)

This region between Bulgaria and Greece is characterised by yet another possibility of cooperation: trans-bounder cooperation. Stimulated by a well-designed Phare subprogramme on cross-border cooperation, two economically weal regions have started substantial growth, which benefits both.

(More on regional learning and development is presented by Dr Tsako Pantaleev in this volume).

Dalmatia (FYU)

Reviving Tourism which has suffered serious decay during the decade of Yugoslav Wars is the main rallying feature of Dalmatian regional development. Distinct from reconstruction in Croatia as a state, Dalmatian initiatives have tried to re-establish the pre-war comparative advantages and competencies: Universities train tourism managers, cities and local territories promote the regional specificity, and investment brings the infrastructure into shape. The over-all motto is geographic identity, stressing the Adriatic Sea and its littoral as the main factors of identification.

Vojvodina (FYU)

A part of Serbia, Vojvodina is a mixed ethnic region. At the times of the FYU, Vojvodina as an Autonomous Region benefited from substantial de-centralisation. Temporarily much under the central power of Belgrade, the change of regime in late 2000 has re-opened the chances for authentic regional development. Rather than being a dividing factor, resident minorities are seen as bridges to neighbour-states with a higher economic standard. Multi-culturality is not seen as a dividing feature, but serves as a means for a shared identity. Further identificatin factors are the location at, and links with, the Danube – and the differentiation from their bigger Serbian neighbours.

Alps – Adria (AT/IT/SI)

Presenting the Alps-Adria region as a multi-state region with common objectives has been a motive for several decades. It peaked with the effort of the project of Olympic Games – *senza confini* (without borders). Instead of ethnic, the joint historic identity (in the Austro-Hungarian Monarchy) provided potential for development. However, the project has somewhat faded to

gain support, not least because of the disruptive interventions of populist-nationalistic leaders in all three countries concerned: in particular, the nationalist and xenophobic interventions of Mr.s Haider and Bossi disturb the common vision, and have delayed joint projects for the time being.

6.3. Stability

6.3.1. Learning Balkans?

When asking the question if south-east Europe can become a learning region as a whole, the recent decade seems to provide little ground for hope. Before any chances of regional learning and development can be realised, the first goals to achieve are others: stability, meaning stability of borders, stability of life (safety), and economic stability and reconstruction.

The following issues would need further investigation:

(a) Which are the incentives, impediments, initiatives, before starting regional development and learning?

(b) How can a discussion be initiated on progress, prohibition, perspectives, to create a joint vision which over-rides inward ethno-centric ideologies?

(c) Is there a willingness to cooperate for reconstruction, reform, resources, to build commitment for a cooperative (instead of competitive) engagement?

Under socialist rule, the state in south-east European countries ranged from the totalitarian to the more liberal. When transition began about ten years ago, much discussion revolved around the role of the state, especially in a market economy. However, this new role was not understood and implemented correctly. Several state failures during transition in the Balkans paint a picture of low state capacity and weak states. Moreover, the state in several countries has failed to develop comprehensive reform strategies, evidenced by poor public governance, high corruption, inability to introduce a proper legal framework and weak institutions, public and private. How does one define low state capacity? Several state weaknesses have accompanied transition in south-east Europe, including: first, low capacities to provide public goods and services, such as public governance, health and education systems, social services and security; and second, an inability or unwillingness to enforce rules of law in a democratic context.

It has been said frequently that the concept of low state capacity in south-east Europe relates to public governance, institutional reform, the extent of corruption and the unofficial economy, and structural changes and economic performance.

State Capacity for Public Governance is a priority requirement. Good governance includes ensuring the rule of law and improving the efficiency and accountability of the public sector.

In south-east Europe, which is still undergoing transition, good governance has great significance for economic growth. To promote good governance, the region's countries are fighting to strengthen markets and institutions and to increase the efficiency and transparency of public affairs. Improving governance also means curtailing opportunities for corruption. These aims are now included in the broad concept of reconstruction for the region.

An important, complex reform process, reconstruction requires an extensive state role in supporting transition, stabilisation, liberalisation and systemic changes in general. Sometimes this role may be confused with paternalism, which is still quite high and influences the speed of strengthening markets and their institutions. One sign of better public governance is the reform of public administration. In the transition countries of Central Europe, public administration is shrinking, creating more room for the private sector to efficiently offer goods and services. In south-east Europe, this has been a slow process, despite the major changes already made.

Since markets are still weak, the need for more and effective public policies could be considered an important transition goal for the short- and medium-term. To improve governance and support development, Balkan states need to invest and spend more, especially in the reconstruction process: they almost all urgently need better public infrastructure. Public sector spending is quite high, while the level of public investment is low. Expenditures go toward consumption rather than development. Much of the public expenditure is directed to wages and to social and welfare systems. Some countries exhibit large expenditures for military and security purposes, while others spend on public order. States like Albania, Bosnia-Herzegovina and Bulgaria show a low share of expenditures of their GDP for different reasons, such as crises, means of financing and economic policies pursued during transition (i.e., maintaining low fiscal deficits while revenues were small). Albania and Romania are good examples of the latter.

Europe's current perceptions of Balkan economies, and the policies applied in recent years, need to be analysed and assessed within the general framework of EU policies towards all former socialist countries in central and south-eastern Europe. Following the revolutionary changes that took place in these countries in 1989, marking the beginning of the transition to multi-party democracy and market economy, the EU undertook a series of measures to sustain the transition. However, different approaches have been adopted towards different groups of countries and these have, to a large extent, been shaped by the perceptions of EU policy-makers regarding their progress in implementing the transition. The result has been very different policy measures on aid, trade access, and accession to the EU.

The combination of 'carrot and stick' (i.e. support and conditionality) has proved to be very effective in Bosnia and Herzegovina, and above all in the recent crisis in Macedonia. It is also at the heart of the proposed approach for the Stability Pact.

The question if a 'Balkan of Regions' can be achieved is evidently linked to the degree to which the vision of a future membership and belonging to the European Union can be

transmitted to south-east Europe. Most likely, this utopian view can be achieved only and after the Suth-east European countries have joined the Europe of Regions.

6.3.2. Constraints and conditions

The following constraints and conditions need to born in mind when 'learning' should become a dominant feature of south-east Europe as well:

Constraints:

(a) the ethnic cleavage is still too dominant to allow for inter-regional (and perhaps intra-regional) cooperation;

(b) domestic resources are still unavailable;

(c) foreign aid and investment are indispensable;

(d) professional associations, at present compromised and weak, need to be reinforced;

(e) social partners, still underdeveloped, need to find their natural role in socioeconomic development.

Conditions:

The following list of issues in need to be addressed is far from exhaustive, but crucial pre-conditions for socioeconomic development and regional learning are: security/peace, rule of Law, banking, property rights, transport corridors, IT infrastructure, etc., ...

These can be achieved via the pilot creation of learning parks, business incubators, and professional clusters. Such initiatives, which have been highly instrumental in the EU for triggering regional learning, need to be created also in south-east Europe.

Rather than theoretic exercises, action-methods need to be applied, action-research needs to substitute pure academic undertakings, and action-learning needs to be initiated. The careful analysis of regional and territorial conditions and situations should precede action, and local and national experts and actors should be natural and permanent partners in such endeavours.

6.3.3. Stability pact and economic reconstruction

On 10 June 1999, at the EU's initiative, the Stability Pact for south-eastern Europe was adopted in Cologne. In the founding document, more than 40 partner countries and organisations undertook to strengthen the countries of south-eastern Europe 'in their efforts to foster peace, democracy, respect for human rights and economic prosperity in order to achieve stability in the whole region'. Euro-Atlantic integration is promised to all the countries in the region. At a summit meeting in Sarajevo on 30 July 1999, the Pact was once again solemnly sealed.

The Stability Pact is the first serious attempt by the international community to replace the previous, reactive crisis intervention policy in south-eastern Europe with a comprehensive, long-term conflict prevention strategy. The idea for the Stability Pact arose in late 1998 and thus predates the Kosovo war. But the NATO intervention undoubtedly acted as a catalyst in strengthening international political will for coordinated and preventative action in the region.

Sub-Table 1 of the Stability Pact for south-east Europe (on human rights and democratisation) has set up a special Task Force on Education and Youth:

Among the main objectives are the development of new forms of educational management, methods of quality assurance, mutual recognition of diplomas and curriculum development. Here cross-border activities, networking of projects and exchange programmes are planned.

The Sub-Table's thematic focuses as established at the Sofia conference have resulted in a division into six working groups:

General education: policy development and system improvement (Coordinating institution: OECD) The main objectives are the promotion of sustainable educational reform, an enhanced flow of information, political support for the opening of programmes of European and international institutions for educational reform in south-eastern Europe, improvement of educational management at all levels and of teacher training.

History and history teaching (Coordinating institution: Council of Europe). The emphasis is on the development of cross-border and multilateral initiatives for teaching and research in order to learn to understand the history of the region from a multitude of perspectives and to deconstruct national stereotypes. The projects include pre- and in-service training of history teachers in new methodology, the development of teaching material and curricula, the support of networking and exchange programmes.

Higher education (Coordinating institution: CRE – European Rectors' Conference) Higher education plays a vital part in the development of a functional civil society through the promotion of equal opportunities, lifelong learning and encouragement of participation in political and social life. Reforms in higher education should also counteract brain drain, which is dramatic in some areas.

Vocational education and training (Coordinating institution: European Training Foundation) Vocational education and training is an essential prerequisite for economic reconstruction and the development of civil society. Equal opportunities and the fight against social exclusion are among the main objectives. Curriculum development and teacher training should help to acquire social skills such as conflict management. Active participation of all key actors (principals, teachers, parents) is essential. Vocational schools and institutions should be encouraged to develop their potentials as community centres but also to pro-actively participate in cross-border/international cooperation.

Note: This activity has now been moved to the second sub-table on economic reconstruction.

Education for democratic citizenship and management of diversity (Coordinating institution: Council of Europe) The working group promotes a concept of diversity which goes beyond ethnicity. It focuses on the diversity of the identities of every human being (nationality, religion, gender, age, ...). Every person is different and has the right to be different. A democratic school climate and multicultural perspectives instead of nationalistic myths and prejudices are as important as education for democracy at all levels (politics, schools, society) – a process in which regional and local actors including NGOs should take an active part together with international organisations like the Council of Europe or Unesco.

Young people (Coordinating institution: Council of Europe) Due to the importance of youth issues a special working group has been set up, which defined its task as 'connecting young people in south-eastern Europe'. Top priority is given to the development of new policies for children and young people, confidence-building measures and networking. Especially young people show great interest in wider information on the Stability Pact and readiness to participate in activities such as campaigns for greater tolerance and cross-border cooperation.

Main criticisms of the Stability Pact during its first and an half years of existence include the following:

(a) Stability Pact started too late

The SP came into being when the main fights and wars in SEE had already happened. Even for Kosovo, where most help was necessary in the first months after air-strikes, expulsion of the Albanian population, and return of the Albanian population (meaning also expulsion of most of the Serb population) in 1999, the SP came too late.

(b) Stability Pact so far only 'stamp' for bilateral initiatives

Although its structures and procedures have started to work now, the SP still does not have its own budget and programme authority. The working model rather provide initiatives with the 'SP stamp' which had been envisaged mostly at the bilateral level, i.e. development projects from and for single countries. In order to work properly, the SP would need its own budget, which can be spent according to the SP's ranking of priority action in its three sectors of action.

(c) Stability Pact lacks over-arching strategy for education and learning

While analysis and stock-taking exercises are well underway, there is still a conceptual void to overcome. Education and training systems, and their upgrading, benefit from the experience of similar reform programmes in CEE. However, the link from education to the broader concept of human resources development for socioeconomic growth is still lacking.

(d) How to start? Pre-conditions and incentives

Culturally 'neutral' models for cooperation need to be presented, and adapted to each specific regional context. The focus should be instead of outcomes and methods rather on transferable tools, practices, and relevant experiences.

Precious experience is available, and looking for targeted capitalisation from the ESF model for regional development and learning. Another attempt is the working group on education for democratic citizenship (coordinated by the Council of Europe). The project on education for democratic citizenship is one example, where the information is collected how to start learning at the regional and national levels without a purely educational view.

6.4. Suggestions (for discussion)

In conclusion, these are the main features of inertia which so far impede the mechanism of a learning region to take off in SEE:

(a) lack of attention: ethnic vs. socioeconomic identity;

(b) lack of competencies: need for de-centralisation;

(c) lack of initiative: inertia and delusion;

(d) lack of resources: foreign stimulation necessary.

As has been suggested above, these could be mid-wifed with the following devices to be applied in the framework of the Stability Pact:

(a) non-ethnic conditionality of Stability Pact projects;

(b) encourage inter-organisational learning EU-SEE (open Socrates, Leonardo, FP5);

(c) enhanced focus on human resources development (now: second Table – ETF);

(d) new focus on trans-ethnic alliances and motivation: communities of civic and professional practice.

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http://www.lib.msu.edu/sowards/balkan/lect23.htm (Journal of south-east Europe & Black Sea Studies)

http://www.lib.msu.edu/sowards/balkan/lect23.htm (Minnesota State University)

http://www.see-educoop.net (Donors Information)

http://www.see-educoop.net/portal/id_graz.htm (enhanced Graz Process)

http://www.seep.ceu.hu/ (Central European University on SEE)

http://www.seerecon.org/RegionalInitiatives/Regionalinitiatives.htm (Regional Initiatives)

http://www.seerecon.org/RegionalInitiatives/WBRegionalStrategy/contents.htm (World Bank and European Commission Regional Strategies)

http://www.seerecon.org/ (World Bank and European Commission)

http://www.stabilitypact.org/ (Stability Pact)

7. Bulgarian context and emerging initiatives

Tzako G. Pantaleev

In the last decade the countries from the region that have signed an association agreement to join EU and later on started negotiations for accession have implemented a lot of initiatives concentrating on training. Some of them were focused on adjusting and reforming the existing training systems or to develop new curriculum together with upgrading the skills of the trainers. Most of the programs were successful or at least marked the beginning of the reform processes in the sector.

All these efforts were made, once because the transition to market economy really demands a change in the way training was designed, delivered and developed; second in order to catch up with the pace of the economically advanced countries in terms of preparing the workforce to be if not competitive at least not to lag behind dramatically. Training is also the key word in the chapters for Human Resources Development in the recently produced National Development Plans.

Bulgaria and Romania joined the European programs and initiatives that concentrate on training issues and especially The Leoanrdo da Vinci Program and are now preparing to start activities using the instruments of the Structural Funds.

This is how the concepts about lifelong learning (LLL) and learning itself as such became actual (replicated at national level), important and are one of the challenges for the professionals in the field of education, training and development issues. The way the above concepts came to be articulated in our countries is similar but does not cover everything EU countries have historically gone through.

Another specificity of looking over learning in the country regions comes out from the fact that the disbalance between the regions is sometimes so great not only because of their historical development but also because of such external factors like the wars in former Yugoslavia or the restructuring of the economy. The new regionalisation of the country done to meet the requirements of EU and to make the regions feasible for using the instruments of the Structural Funds also is a specific factor in understanding the nature of the coming local development initiatives.

Thus the actions undertaken and the role of the regional initiatives in the field of education and training are most important now for achieving economic and social advancement within the country.

The main questions asked when we speak about learning at regional level now are:

(a) How learning, not just training, contributes to the development and upgrading of the human assets of the region/community?

(b) How is the existing knowledge, or the knowledge generated in the institution dealing or not dealing with research and training in different parts of the region made accessible to others whom it may benefit?

(c) Do the communities and partners have the systems and programs in place to enable to use learning or create a culture of LLL? Are there learning organisations available?

(d) How the understanding of the culture, taking care of the intellectual capital and also benefiting from the lessons learned from the experiences are handled locally?

In other words we speak about how are the values, philosophy, and vision of the local community communicated to all the possible partners and stakeholders on a continuous bases? And of course, who is taking the leading role to facilitate the learning transfer process at all levels of both the region and the smaller communities?

This to a certain extend broadens the work definition of the learning region as 'a region implementing an education -led innovation strategy', but on the other hand brings us closer to some of the issues of the EC Memorandum on LLL.

What is the new thing about the cooperation between educational and training institutions and community institutions, and local enterprises that make us redefine it and reinforce the role of learning to bring the specificity? The 'linear' and the interactive ways of thinking and approaching learning or there is something beyond them that changes it so much as to introduce the new concept!

In the context of globalisation of the economy, increased competition and the use of information technology the provision of education and training services develops in a way which makes the traditional main agents in the process to change themselves, but also to interact with other partners so to achieve competitiveness of their product.

Teachers and trainers have to join efforts with managers in order to develop individual plans for training not only 'to wait' the trainees to come to them and use the courses existing. ([30])

Universities and enterprises are intended to develop new educational and training partnerships and networks as to cover all the process from producing to consuming the products.

The management of training and education at individual level, joining the efforts of the education and training professionals with those of the managers in the specific businesses is the core of learning.

But in order to network and build partnerships for learning those involved also have to have and breed the culture for learning. This is a new challenge for the countries from the region as far as their education systems are just now transforming to overcome the specialised subject

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([30]) Meister, Jeanne C. *Corporate quality universities: lessons in building a work-class workforce*. New York: IRWIN professional Publishing, 1994.

teaching. Continuous learning supports the development of the culture of the once involved on the other hand. We speak about learning culture when a community or an organisation achieves the following:

(a) encourages all parties involved to identify their own learning needs;

(b) provides regular review of performance and learning for all parties involved;

(c) encourages all parties involved to set challenging goals for themselves;

(d) provides feedback at the time on performance and achieved learning;

(e) revises of the performance of the leaders/leading parties to help to develop others;

(f) seeks to provide new experiences from which the parties involved can learn;

(g) provides and/or facilitates on the job training;

(h) is tolerant to some mistakes provided the parties involved try to learn from them;

(i) encourages parties involved and individuals to review, conclude and plan learning activities;

(j) challenges the traditional way of doing things.

At the same time the social aspect of the learning change is also very important. As far as not all parties acting at local level can afford and use the cream-of-the-crab in their field the process of mobilising the resources available to solve problems and to work in teams is to be considered as a start to reach the learning dimensions in their community.

The availability or absence of institutions, organisations and companies having or aiming at learning culture is a starting point in promoting initiatives complying with the 'learning region' concept.

So, before going to the concrete examples of existing practices of learning regional projects or community initiatives we have to answer the question is the environment positive for such initiatives in countries like Bulgaria?

Being still in transition to market economy the country does not yet have in place well developed systems/infrastructures for continuing learning processes including ([31]):

(a) executive and managerial training and learning courses;

(b) formal training courses based on competencies;

(c) structured on-the-job training;

(d) career guidance services;

(e) learning structures within or out of the entities;

([31]) There is a working document, *Concept paper on continuing vocational training*, that's trying to mobilise the efforts of all the partners in the field of vocational education and training.

(f) informal learning opportunities, etc.

We also cannot speak about network of organisations across the country having most of the basic characteristics of learning organisation:

(a) developed strategy/vision – a clear picture of now and the future;

(b) established executive practices, leadership environment with skills and knowledge appropriate for the nature of the organisation;

(c) established practices, processes and incentives for individual learning;

(d) supportive climate for learning with rapport and trust;

(e) open organisation/job structure without stovepipes;

(f) open sharing of all relevant information;

(g) established and functioning individual and team practices;

(h) clear, collaborative and regular feedback about performance according to the organisational goals;

(i) formal and informal mechanisms for continuous learning;

(j) formal and informal incentive systems (rewards/recognition) support.

But still we can give a positive answer to the question of existing and emerging practices of learning region initiatives or some components of it because of some objective reasons:

(a) the economic environment, luck of experience, resources and appropriate quality of the workforce very often urges the different players in VET to join efforts;

(b) the training as such always includes a knowledge component that sometimes predetermines an outside agent to be involved;

(c) very often the technologies and practices used or needed to be implemented are coming from outside and thus ad hoc presuppose learning as a process;

(d) Bulgarians are very open for innovations and the country has generally well academically prepared cohort of people.

Bulgaria joined the Leonardo da Vinci program in 1998 and the first application bid was quite successful. It has also prepared some projects for strengthening the regional capacity for VET financed under Phare 2000.

7.1. Community oriented initiatives with social objectives

Following an agreement between the governments of the Federal Republic of Germany and the Republic of Bulgaria in 1994 three training centers were established in the regional towns of Pazardjik, Pleven and Stara Zagora. All of them have the status of state owned vocational

schools and are specialised in building machinery and equipment, metal equipment and crafts and technology ([32]).

The Qualification training and retraining center in crafts and modern technologies in Pazardjic opened in 1995 and since then has played a leading role in introducing new ways of training and networking among the different partners in VET on local level.

The Center concentrates on vocational education projects and initiatives that correspond to the needs of the market economy and support the transition process. It organises short and long-term courses (lasting from one week to two years) in the field of economics (knowledge and skills for market economy and management of companies), technology and language training.

In order to be efficient and effective the Center cooperates (and in fact initiates the process) with the municipality and its related service offices like the Employment Service office, the unions, local vocational schools, companies, the youth institutions, etc. It has established a practice every Thursday to advertise and promote opportunities for training it can provide in the municipal radio program. It works closely with the unions to be proactive in training for workers that are going to be made redundant ([33]). Training for employed workers including the once from SMEs is also one of the activities of the Center and is a unique experience for Bulgaria.

The Center organises regularly the so-called 'days of open doors' for different target groups to promote the opportunities for training and permanently tries to tailor its courses according to the needs of the customer.

The other two Centers have concentrated their efforts on meeting the needs of the local companies not only to meet the problems of restructuring (unemployment, re-qualification, etc.) but also to raise the productivity and the quality of their work by providing opportunities for training of their employees.

A very specific aspect of their work is way they developed their marketing strategy. They hired a special consultant to prepare it asking him not only to develop the new image of the Centers but to concentrate on the motivation of the local clients that are using their services. One of the main goals of the strategy is to create a culture for continuous upgrading of skills in the local companies, especially SMSs.

Another example for an initiative that takes on board local issues and involves local parties interested is the 1999 Leonardo da Vinci Comtrain project in the town of Gabrovo (see Section 7.3.2. - third pilot project).A wide range of local institutions – a number of private companies, the Technical University of Gabrovo, the Chamber of Commerce and Industry of

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([32]) For more information see the publication of the Bulgarian national observatory for labour market and vocational training, reports, articles, views N9.

([33]) The unemployment rate in the region is 23,8 % for June 2000 - NSI, labour force survey.

Gabrovo and the Municipality of Gabrovo – decided to join their efforts in and to create better training environment for SMEs in the sector of electronics and electrical engineering. They consortia tries to develop training materials and meet the needs of SMEs in the field. Through Comtrain the team contributes to reducing unemployment, facilitating personal development of the employed and improving SMEs' competitiveness.

Another Leoanardo da Vinci project aimed at solving local issues is the HOTEL NEU. Varna Association of Travel Agencies (the northern part of Bulgarian Black Sea coast; see Section 7.3.2. fourth pilot project) and the College of Tourism in Varna united their efforts to help the employers and employees within newly privatised hotels, the family-owned hotels and those who want to start their one man companies in the field of tourism. The Glossary they want to prepare and the training to be promoted is concentrating at a very specific need of regionally specific business.

Still another example is an exchange project from a small municipality in north-east Bulgaria – Viatovo – where the local authorities responsible for training joined efforts to create capacity for development and implementation of employment programs and techniques for social integration of unemployed people at risk of exclusion from the labour market. The exchange is initiated by the Employment Bureau, the Regional Employment Agency, the University of Rousse and the Employment and Structural Development Society, a non-profit organisation.

7.2. Universities as facilitators of innovations on a regional basis

One should not expect that universities in Bulgaria cover most of the characteristics to substitute the activities of what is covered under by so-called Corporate Quality University in their mission to prepare a world-class workforce. Still in most of the cases exactly they have the leading role to unite business and training and education. It is normal in a situation of luck of resources on both sides the idea, the beginning of the process to train all kind of workers in skills, knowledge and competencies they need for their current job and to be able to adapt to future job requirements to come from the academic community.

The University of Rousse (Faculty of postgraduate studies and further education) is leading a project for developing the language knowledge and skills for targeted local small business in the town together with a number of non-profit and regional agencies and municipality services (see Section 7.3.2., second pilot project).

There are some other projects where the university meet specific needs of leading businesses of regions (see Section 7.3.1).

The New Bulgarian University (NBU) is the one that comes closer to the characteristics of a facilitator for learning activities – it is involved in a number of training programs for

companies, promotes the philosophy of continuous learning and is trying to create a level for cultural change towards learning.

NBU together with Union Minier – privatised big copper refining plant – is working not only to retrain the workforce of the community where the big enterprise is situated but also upgrade the knowledge and the skills of the employees. They have developed a system for annual evaluation of the staff at all levels and the compensation is build on that. The training delivers managerial skills for both the managerial staff and the technical level workers. The company is trying to train its employees to be able to cover several workplaces.

It was identified that the managerial and technical staff of the company has very good technical knowledge and skills but lucks the mentality and skills to work with people as well as the company culture. The training provided by NBU (courses in management of change, effective manager, etc.) is aimed to meet the needs and overcome the gaps and meet the individual needs of the trainees.

NBU is a private university and is one of the few that has a Further Education Faculty.

7.3. List of projects of the Leonardo da Vinci Program concentrating on solving problems and meeting regional needs

7.3.1. Multiplyer-effect project

Title: Student monitoring and remote tutoring – Enlarging regions (Smarter)

A project where a private company (Paraflow Communications Ltd) and an University (Faculty of computer systems and control, Technical University of Sofia) are trying to create better environment for interaction among the professionals in the computer community in Sofia and networking with the branches of the Technical University in the country.

A project for the development of computer-based open and distance hypermedia training and assessment system for key engineering skills supported by innovative methods of analysis and assessment of competencies by individuals and companies. The main product is the Pictorial User Interface (PUI), complemented by hyper modules, which provide an adaptive hypermedia application compatible, with Internet. It is used to create distance-training environment that can be adapted to the needs SMEs. The aim is to transfer innovative training system based on Internet technologies

The direct beneficiaries of the project will be young graduates, young workers, trainers, designers and managers of training programs and training managers in the computer and related activities sector. The main target group is SMEs, but universities, training

organisations and institutions, which employ computer specialists, will also benefit from the project outcomes.

7.3.2. Pilot projects:

Title: Vocational training in biotechnology innovation and environment protection (BioINEP)

A project joining the efforts of an University (Scientific Research Department of the 'St. Kliment Ohridski' Sofia University), and private companies (Worker and employees in SMEs of Biotechnology in Chimatech AD and Mlechna Promishlenost AD) to meet the needs in a special branch of industry concentrated in the region of Sevlievo and Sofia.

The project aims through analysis of training services available at targeted SMEs to identify and develop a training and dissemination plan, curriculum, teaching materials and the training of trainers including specific activities for industrial liaisons officers for University-Industry cooperation.

Title: Developing joint language training curricula and specialised language materials.

The project is a joint effort of a University/training institution (Faculty of postgraduate studies and further education, University of Rousse) and a number of non-profit and regional agencies – Business support centre for small and medium-sized enterprises of Rousse, Management and Business Development Centre of Rousse and the Regional Employment Agency of Rousse .

The project is concentrating on the development of joint language training curricula and specialised LT materials for:

(a) German and English for SMEs in tourism/hotel/catering industry for Bulgarian/Greek learners;

(b) German and English for medical purposes (nurses, physiotherapists, health-care sector) for Bulgarian/Greek learners;

(c) English for telecommunications for German/Bulgarian/Greek learners.

It targets students in training, unemployed graduates, owners/managers of SMEs in Tourism and future workforce to be employed in transnational initiatives and enterprises.

Title: The company of the future through on- and off-the-job training (Comtrain)

The project is initiated by a wide range of local institutions – Mechatronica S.C., STS Electronics and Unitraf (private companies), Technical University of Gabrovo (research and training institution), Chamber of Commerce and Industry, Gabrovo (regional branch organisation) and the Municipality of Gabrovo – and is targeting a large local audience –

engineers; executives at all levels within SMEs; trade and industrial organisations; municipal administration; universities, training organisations; university lecturers; social partners; unemployed.

The objective of the project is promoting lifelong training so as to encourage ongoing adaptation of skills and qualifications to meet the needs of employees and undertakings, contribute to reducing unemployment, facilitating personal development and improving SMEs' competitiveness. The project envisages development of training modules for SMEs in the sector of electronics and electrical engineering in the region of Gabrovo, and multiplication in other Bulgarian regions. They will meet the needs of SMEs in the area of electronics and electrical engineering in the fields of product design, development of methods for measurement and control of product quality, researching possibilities for supplying with high-quality materials and components, researching markets and potential customers to place new orders, introduction of reliable operating system for job assessment and work organisation, efficient and flexible management.

Title: Innovations in hospitality industry and their transfer in the vocational education, as well as upgrading qualification of those engaged in small- and medium-sized enterprises and the students in the College of Tourism of Varna in Bulgaria (HOTEL NEU)

The project is initiated by Varna Association of Travel Agencies (professional organisation) and the College of Tourism of Varna to help the employers and employees within newly privatised hotels along the northern part of Bulgarian Black Sea coast and family-owned hotels .

Via the pilot courses run by Bulgarian and foreign specialists, as well as via the guide for family hotel business, the project aims at the qualification of those engaged in tourism, as well as at stimulating entrepreneurial spirit when establishing one's own business. The experience exchange in the field of language studies, as well as the multilingual glossary in family hotel business will stimulate an attainment and elaboration of knowledge and skills in the language of the profession. The project is designed and directed at representatives of small- and medium-sized enterprises, tour-operators, representatives of Chamber of Commerce and its organisations, of the regional/municipal councils of tourism, lectures and students in the College of Tourism of Varna. Indirect customers/consumers may be all those who utilise the services of hospitality industry.

7.3.3. Projects for exchange

Title: Social integration in the labour market

The exchange is initiated by the Employment Bureau of Viatovo, the Regional Employment Agency of Rousse, Rousse University 'Angel Kanchev', and Employment and Structural Development Society – non-profit organisation, to create capacity for development and

implementation of employment programmes and techniques for social integration of unemployed people at risk of exclusion from the labour market.

The team of instructors, administrators and lectures aims at acquiring innovative knowledge and skills for the purpose of developing, preparation and implementation of regional programs and initiatives for social integration of risk groups on the labour market and in society with possible multiplication in other regions of Bulgaria.

Another activity involves the acquisition of practical skills for the development of projects for modular program for the different types of risk groups. The training consists of theoretical instruction through lectures, seminars and consultations as well as some practice.

8. Developing a local response to the needs of vocational training

Pierre Courbebaisse ([34])

International society has for many years been undergoing continuous economic and social change. Globalisation and technological development are radically changing people's forms of work and training.

Enterprises (both small and large) are facing increased competition and are increasingly dependent on the competences and qualifications acquired by their various categories of staff. Employees are playing a direct or indirect part in this process of growth and competition. Vocational training and lifelong learning are becoming essential.

Europe has some 20 million small and medium-sized enterprises employing over 110 million employees. They occupy a major if not essential place in local and national economies.

In the area of training and apprenticeship, SMEs are therefore an indisputable force and a major market.

It is clear that this responsibility for vocational training must be shared between governments, enterprises and the social partners. SMEs are not, however, always well represented by these social partners. Organising such training schemes raises many problems for them. They therefore need help when developing new strategies and introducing training schemes. Training agencies must play an increasingly significant role.

The more human regional level seems the best and most transparent level for this approach.

8.1. AFEC and regional development

Pierre Courbebaisse is taking part in this conference both as a vocational training specialist and as Director-General of the group AFEC-POINT F, a private institution covering 11 French regions.

AFEC-POINT F is involved in socio-occupational integration and qualification schemes in the sectors of hotels and catering, distribution and commerce and new personal services.

([34]) Author of the *Guide pratique de la formation et de l'insertion professionnelle* [Practical guide to vocational training and integration].

Established in 1975, AFEC-POINT F, which has handled over 10 000 young and adult jobseekers and SME employees, has taken local qualification and recruitment needs as the starting point for its growth.

AFEC seeks to match up the groups available through its very strong partnership with reception networks (local missions, ALEs).

Its supply is provided through a network of branch offices and local authorities and enterprises. It covers all theoretical and practical aspects of training and employment.

These links with the local economic fabric have made it possible to develop continuing vocational training for enterprise employees on an individual basis or under the training plans set out in the Law of July 1971.

This pragmatic approach to the local construction of training schemes has been assisted by the choice of AFEC-POINT F to finalise schemes using those qualifications or certificates most appropriate for the success of the groups involved and the interests of the enterprise.

AFEC thus develops co-contracting with public initial vocational training institutions, such as the Ministry of Education, the Ministry of Labour or the occupational sectors.

This experience that we have gained from the development of a proactive local supply allows us to examine the issues of the learning region and the development of lifelong learning from a broader point of view, and to look forward at both these levels:

(a) from the political point of view, in terms of a new governance or steering of vocational training,

(b) from the point of view of training methods and content, through the use of the potential offered by the technical and cultural heritage of our regions.

Ensuring the professional status of our supply and our teams has been a constant concern. It is now being supported, in some of our offices, by the introduction of in-house quality strategies – strategies based on standards and confirmed by the ISO 9001 and OPQF qualification labels, and by the introduction of regional quality charters, initialised chiefly by the Regional Councils.

8.2. The French situation and conception

In France, the decentralisation laws of 1982 and 1983 stepped up the powers of the Regions over continuing training and apprenticeship.

In an IFOP poll conducted in April 1999, at the request of the Senate, and in the context of the current debate on decentralisation, 70 % of respondents expressed a preference for the level of region and country. This result is one of many illustrations of the current popularity of the region and its local politicians at a time when it is felt that national parliamentarians need to regain credibility and popularity.

This is one of the reasons why the region offers an ideal context for an overhaul and appropriate practical implementation of vocational training.

8.2.1. The institutional region as a leader for training and integration

The regional area is useful for vocational training because its politicians and citizens have close links, and because of its dynamism. Vocational training, however, as a factor of human resource management and a lever for economic growth, may in return be very profitable for the region in the current competitive context.

Appeal is one of the key words of regional policies. In the context of globalisation, competition between regions and local authorities is growing apace in our country and in the European Union.

Competition plays a role of economic and social emulation between the regions of European countries, but also between large cities at world level.

The region must be attractive both to people and enterprises. Its position is important in this play of market forces.

The wealth of human resources and the steps that are taken to keep and improve them are also factors in this appeal. Human resource management is shifting away from the enterprise to the local area: the regions will have to take up the responsibility.

Infrastructure of all kinds is no longer enough. Other parameters are involved: living standards, opportunities for training and redeployment.

Vocational training has a major role to play here.

8.2.2. Training as a lever for regional human resources

As a remedial and also promotional instrument, vocational training is one of the key areas of regional human resource management. It plays a part in developing an area's economic performance.

There are many arguments for this active presence at regional level: demographic issues and in particular population ageing, the regionalisation of unemployment, new types of work and life – for instance, teleworking and urban concentration or urbanisation of rural areas, the development of new technologies and the use of the Internet to transmit and disseminate knowledge.

Training can play a part in reducing inequalities (only 10 % of employees attend training) through local solutions and incentive measures.

The wide range of public/private partnerships at local level (employment grants, mentoring, etc.) need to be steered by a leader who can provide overall coordination and has close links with citizens.

8.2.3. Training and local development

Regions are not closed cells committed to values that must be preserved at all costs. Endogenous economic growth does not rule out exogenous economic growth.

One of the advantages of policies supporting local development is that they leave considerable scope for people's imaginations (which helps to improve individual and collective performance). Small and medium-sized enterprises have a key role to play here.

Training must provide support for regional construction. Training must play an incentive and supporting role, in particular in the context of training schemes for enterprise creation or development. These training and development schemes are still too limited. The level of investment in human resources is still very low.

This training at regional or local level is better focused on the person, is more in keeping with the needs of the individual and improves the area's appeal. This does not mean that it should focus solely on individual needs. It is not just an instrument for personal enrichment but also a tool for collective growth.

Training sites are training laboratories as well as meeting places.

They make it possible to forge links between individuals (in some cases the best-motivated people likely to generate activities) and to develop networks and levers for the economic development that is essential for regions. This fertilises socioeconomic action.

Training cannot therefore have only an institutional and instrumental dimension. Knowledge needs a human-sized area. The region, with its smaller dimensions, is a space for learning and training where all the services are available. As a result of the implosion of the traditional family unit and the upheavals in employment and labour structures, training has to provide answers to other kinds of needs and human resource management.

8.3. Conclusion – The learning region

In practice, the State continues to play an important role in this field. The regions play only a modest part in the formulation of guidelines and vocational training schemes for adults.

The complex nature of the system means that it is difficult to formulate a legible and transparent overall policy.

Nevertheless, redefining prerogatives over employment and enhancing the role of regions as major players who share responsibilities with the social partners and the State, would allow

the system of continuing vocational training to be simplified and would return the individual to centre stage in the concerns of the national and regional public authorities.

A better-defined regional space could offer everyone the opportunity to attend schemes enhancing their employability and enabling them to build up an occupational plan. The individual could thus acquire the additional skills or qualifications needed for a particular job.

The reduction of working time and the new forms of work are making individuals more responsible.

Making the operation of continuing training as transparent as possible in the region, for both people and enterprises, would give this system a genuine role. There are also major needs for counselling and guidance for training. The new technologies are set to play an increasingly significant role here. The social partners (employers' organisations and trade unions) have to play their part by promoting the use of such technologies.

If decentralisation to the region is to be continued and responsibilities clearly demarcated between the region and other players, this process must be accompanied by a new approach to vocational training – one which is based on making the most of local resources.

The region must forge new relationships with its citizens, especially in employment issues.

Regular consultations could be envisaged – surely the purpose of any decentralisation is to bring citizens into the process as players? – with the help of the new technologies, in a region, an employment catchment area or any other feasible administrative division.

The reform of the Regional Council ballot method will change assemblies:

(a) elected officers will belong to a regional constituency as a result of the election method;

(b) the dialogue on vocational training between the elector/citizen and regional structures will pick up speed, as the Region will now be perceived as the leader in this field.

Of course the social partners will have to play an increasingly active role.

A mechanical or technocratic approach to training needs is no longer enough at a time when human resources need to be mobilised.

It is the responsibility of local and regional politicians to take the lead in reflecting on a regional development plan.

Within this plan, training and its potential will have to be managed in a different way.

Flexibility and change are needed in the area of the training supply. This must be regional, local and increasingly transparent, especially for small and medium-sized enterprises and their employees.

9. The European social economy from a welfare regime perspective and the linkage to new social partnerships and learning regions

Sven-Åge Westphalen

9.1. Introduction

The merger of 'social' with 'economy' is not only a technical matter of finding appropriate solutions to complex problems but triggers fundamental questions as to the continuation of different national welfare models within an increasingly present EU context. In other words, the integration of social considerations into economic policies has not only consequences for the policies themselves but has repercussions to the way societies are constructed and perceived.

At the European level and nationally there is an increasing focus on how to balance economic competitiveness and social cohesion. At a European level 'social' is primarily linked to poverty, rate of (long-term) unemployment and education/learning, which is the social equivalence of the top economic priorities, e.g. growth, employment and skills. Nationally, 'social' is perceived in broader terms and includes not only social activities related to the economy but also to the inclusion of weaker groups into society at large, e.g. immigrants, handicapped, people with social disabilities, etc., into work, leisure time and social activities.

Specific approaches to more efficiently addressing socioeconomic challenges in the crossroad of social and economical, demand and supply often include the establishment of what is frequently named public-private partnerships, new social partnerships or corporate governance.

It is within this overall framework of partnerships that learning regions unfold as one specific feature.

9.2. Welfare regimes

It is generally acknowledged that there are three welfare regimes prevailing in EU: the Scandinavian model (Denmark, Finland, Sweden), the Continental European model (Austria, France, Germany, Italy, Portugal, Spain) and the Anglo-Saxon model (Ireland, United Kingdom). Although typologies should be used with caution, they do provide a structure for further debate.

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Typologies of the different welfare regimes are highlighted below, which provides an understanding why partnerships and learning regions may be easier to adopt in some countries.

		Anglo-Saxon model	Continental model	Nordic model
Roles in welfare mix	Family	Marginal	Central	Marginal
	Market	Central	Marginal	Marginal
	State	Minimal	Subsidiary	Central
Welfare state	Primary target	Secure against poverty through minimum welfare	Secure insiders and their families a high level of welfare	Secure as many people as possible most possible welfare
	Type of solidarity	Individual (non-existing)	Partial (within the family and groups at the labour market)	Universal (link between individual and the state)
	Coverage	People in need	People in the workforce	Universal
	Redistribution	Limited	Limited	Extensive
Transfer payments	Coverage	Limited	Extensive for A-team	Extensive
	Size	Small	High for A-team, low for B-team	Medium/high
Public services	Range	Limited	Limited	Extensive
	Quality	Limited	Medium/low	Medium/high
Costs	Size	Small public social costs but pig private social costs	Big public costs	Big public costs
	Funding	Relatively small taxes, high user payment of services and high premiums for private insurance	Mainly social payments, user payments and some taxes	Mainly taxes, some social payments and a little user payment
Advantages and disadvantages	Main advantages	Good for insiders	Relation between payments and rights	Provides easy access to the labour market (esp. women) Protects weaker groups
	Main disadvantages	Low-income jobs Polarisation between rich and poor	Poor coverage of income and employment for the B-team. Administratively and political heavy	Expensive and, consequently, requires a high active labour force
Policies		Scarce child and elderly care Little paid maternity and parental leave Lax employment protection legislation Easy accessible but short-term and non-generous unemployment benefits Little active labour market policy	Scarce child and elderly care Available but non-generous maternity and parental leave schemes Strict employment protection legislation Generous but selective unemployment benefits conditions to work dependant upon status Little active labour market policy	Extensive child and elderly care Generous maternity and parental leave schemes Lax employment protection legislation Easy accessible and generous unemployment benefits for low income groups Tough conditions to work Active labour market policy

Partnerships, including learning regions, are a means to overcoming strict divisions between various sectors, public, private and civic, and between various actors like enterprises, training institutions, public agencies, etc. As such, they ideally provide more flexible and cost- or expertise-optimising instruments for project development and implementation, both within policy-making, business management and project execution.

However, partnerships do also infringe upon 'business-as-usual' procedures, structures and organisations, for instance if actors in the same sector form partnerships. This is even more the case if actors from the public sector are involved or if partnerships depend on public funding, as is often the case. In these circumstances, it becomes relevant to analyse or as a minimum to question to which degree partnerships may in fact be a silent evolution of the balance between public and private, market and civic. This is relevant for all actors, for instance if businesses want to take on social responsibility or participate in training activities outside their own needs and how this is viewed under a downturn in the economic cycle, or if training institutions increasingly must supplement lump sums from the government with other income.

9.3. Examples of partnership thinking evolving into EU policy formation and implementation tools

Following the Luxembourg Summit in 1997 the National Action Plan for Employment was introduced as a means to coordinating national policies and in order to learn from best practice. At the Nice Summit 2000 it was decided to complement NAP-employment with NAP-inclusion, e.g. national plans to combat poverty and social exclusion). While many EU programmes, e.g. social funds, Leonardo, Socrates, etc., have addressed certain problems from a practical bottom-up model, the two NAPs essentially mark a breakthrough where national policies have started to become compared and undergoing some, albeit still modest, benchmarking.

The European agenda is very focussed on growth, employment and, recently, social cohesion. The implementation follows many paths but is, like the NAPs, increasingly based on EU/governments/ public authorities providing the framework and/or funding within which various partnerships unfold. This is sometimes referred to as the inadequacy of public governments' capabilities and resources, while others see it as a natural development from government to governance, e.g. a shared responsibility for socioeconomic progress between the public, private, voluntary and community sectors.

9.4. From government to governance: new social partnerships

Traditional social partnerships, e.g. between employers' associations and trade unions, is a common feature in most national labour markets that has been successful in achieving competitiveness and employment goals, often in strong cooperation with governments. However, it is increasingly recognised that continued success in addressing the dual aims of economic growth and social cohesion requires generic responses from a wide range of actors within society that extend bi- and tripartite cooperation.

Supplementing employers' associations and trade unions, the new social partnerships include (based on Nelson and Zadek 2000):

(a) a wide variety of civil society organisations, alliances and networks, operating locally, nationally and across borders;

(b) individual companies;

(c) new 'business in society coalitions' or thematically organised business networks;

(d) local, regional and national public institutions, authorities and governments;

(e) regional and international multilateral governmental organisations, such as the European Union, OECD and ILO;

(f) think tanks, foundations, research institutes and academic institutions;

(g) education and training institutions;

(h) individual citizens.

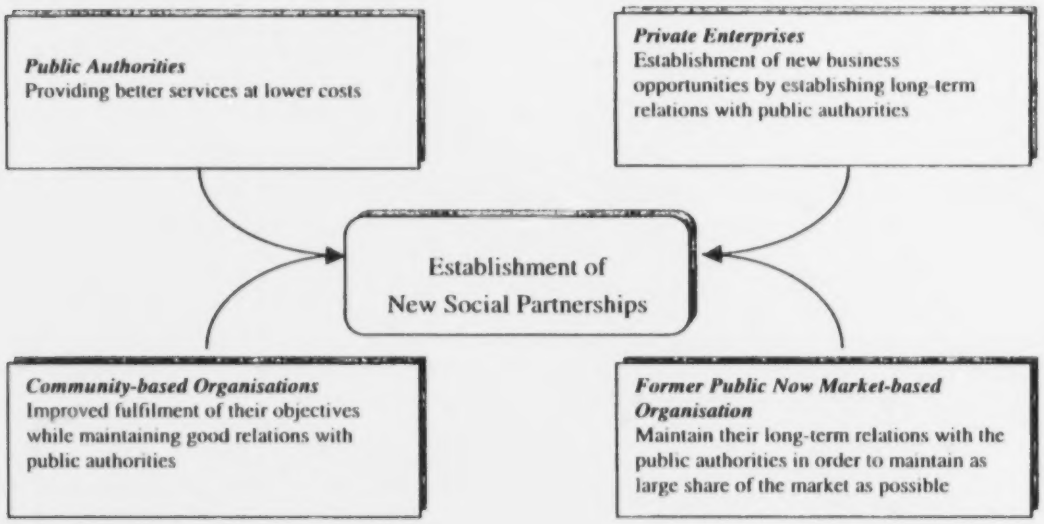
EU increasingly uses partnerships for general policy formation and coordination, e.g. NAP-employment and NAP-inclusion. In both NAPs, which are prepared nationally, there is a broad range of contributions from the public, private, voluntary and community sectors. Further, EU advocates the use of partnerships in specific programmes, such as the structural funds and in Community Initiatives (European Foundation, 1998).

Nationally, governments have given area-based partnerships a wide and complex agenda in recent years as a means to addressing economic and social questions (OECD, 2000), partnerships that involve macro-economic planning and local coordination, formation and implementation. 'These new alliances represent an important source of innovation in both practical action at the local level and policymaking at the European and national levels (Nelson and Zadek, 2000).'

New social partnerships are formed around a broad range of socioeconomic elements including but not limited to labour market issues. Employment and inclusion of weaker groups into the labour market cohesion are important areas but also education and training are increasingly formed around broad learning partnerships.

9.5. Triggers and drivers for partnerships

Partnerships may have various forms and include different partners. However, public funding, either local, regional, national or from EU, is generally essential for the existence of partnerships within socioeconomic development, including those related to education and training (see also Cedefop 1999).


Public Authorities
Providing better services at lower costs
Private Enterprises
Establishment of new business opportunities by establishing long term relations with public authorities
Establishment of
New Social Partnerships
Community-based Organisations
Improved fulfilment of their objectives while maintaining good relations with public authorities
Former Public Now Market-based Organisation
Maintain their long-term relations with the public authorities in order to maintain as large share of the market as possible

Westphalen 2001

The essential trigger for public authorities is the political will to include private business and other actors in the provision of publicly administrated or funded services and/or to withdraw from areas previously under public administration. The political will is founded either on ideology or on pragmatism based on economic or efficiency calculations. Successful outcomes depend on whether stakeholders are in favour of such dispositions or, as a minimum, not sufficiently hostile. Further, legislation and organisation must be in place and, lastly, there must be providers/partners with sufficient skills, expertise and resources to cooperate with or to contract.

Private enterprises see the participation in partnerships as an extension or improvement of normal business activities albeit in new settings. While business activities generally tend to be short- to medium-term oriented, their participation in partnerships may have longer-term perspectives. The willingness to expand their normal time-range for returns to investments must be seen in the strategic perspective of forming new partnerships, entering or expanding new markets and to establish long-term relations with other, relevant, actors.

Training institutions are either public or private, generally, and will therefore follow the same rationales as already expressed. In addition, the cooperation between training institutions and with other actors outside business-determined activities may be seen as a means to broaden and deepen their business activities while also qualifying and/or supplementing the individual institution's core activities.

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Civil society organisations are increasingly included in partnerships because they generally uphold strong links with and are trusted by the target groups/end users. Essentially, there are two overall civil society organisations. The first, NGOs, are generally professionalised organisations with relatively many resources and are often advising on government policies and even contracted for implementing policies, e.g. trade unions, employers' associations, voluntary integration organisations. The second group, community-based organisations, often has a limited, geographical coverage, is often more voluntary based and single-issue oriented. They have often comparably few resources than the first group. Both groups participate in partnerships for three reasons: they will pursue their general objectives, they will show their commitment to the community to the political levels and thereby be perceived favourably from their major funding body. And thirdly, participation will ensure additional, although targeted funding.

Outsourcing and privatisation of formerly public organisations has led to a dramatic increase in 'quangos', e.g. quasi autonomous non-government organisations, either still publicly owned but operating on the market or entirely dependant on public authorities as the only customer. They are generally a symbiosis of public, private and civil society organisations' drivers but are often, although dramatic overnight changes may occur, more secured from elimination from the market than most other actors.

9.6. Risks and challenges

The implications of new social partnerships are potentially enormous, as can be indicated by the intense debate over the future of the welfare state in most western countries, the major blows given to Shell and other multinationals which have not adequately aligned with the new value orientation, and the insecurity and even alienation some segments of population feel under the current, globalised or at least internationalised realities.

For many individuals, be they activists, CEOs, workers, ministers, consumers or simply citizens, it is difficult to steer through long-established stereotypes. Likewise for organisations, which have often been created for a relatively simple set of functions and objectives and, in time, have developed a corresponding set of values, norms and culture: Now they find themselves being reorganised and forming partnerships and networks with formerly opposing parties.

However, current consensus-oriented pragmatism should not delude us to believe that underlying discrepancies have seized to exist as has clearly been accentuated by the demonstrations against WTO, the World Bank and EU summits. Nevertheless, the area of common interests has widened despite differing opinions thus providing a wider scope for cooperation alongside mutually shared objectives. The room for developing new partnerships between hitherto opposing actors is thus increasing as can be demonstrated when organisations like Greenpeace or Amnesty International form partnerships with multinational companies once perceived as the 'enemy.'

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Still, as the lengthy quotation below clearly states, long-term reliance on the business community to ensure societal goals cannot replace firm control by governments and public authorities.

'A review of various corporate surveys that attempt to identify the drivers of corporate responsibility suggests that one of the main factors inducing firms to respond to environmental and social issues is, in fact, government regulation or the threat of regulation (Flaherty and Rappaport, 1991; Pratt and Fintel, 1999; Hansen, 1999). Pressures associated with NGO activism, including consumer boycotts and environmental campaigns, the threat of litigation, critical media attention or public opinion may also figure prominently. Other sources of pressure such as so-called ethical investors or shareholders have also emerged in recent years (Utting, 2000).'

In other words, there are limits to partnerships. The challenge is to ensure that the emerging new values, identities and roles become the norm for actions, be it by societies, business and individuals. This is especially the case when wealth is increasingly created through intangible products, thus accentuating even further the preservation and development of social and human capital.

Utting (2000) clearly points to the very critical aspect of partnerships, which accentuates the balance between short-term gains and long-term stability: 'Perhaps the most significant concern with some forms of voluntary initiatives and partnerships is that they may serve to weaken key drivers of corporate responsibility – namely government regulation, collective bargaining and certain forms of civil society activism.'

The growing acknowledgement of human and social relationships as the very precondition for wealth creation, social cohesion and sustainability results in increasingly more individuals, enterprises and governments changing attitudes and behaviour. The challenge is thus to ensure that the negative aspects are avoided and, in specific partnerships, that stereotypes are overcome while still respecting different working cultures.

Despite the enormous progress in the shift from materialistic, quantity and short-term thinking towards holistic, quality and long-term acting, this is not an inevitable process. Dedicated frontrunners, be they individuals, investors, enterprises, organisations or public authorities will not transform the behaviour and actions of the vast majority unless values change, incentives are created and/or pressure pursued.

In order to reach the critical mass, e.g. rendering the process irreversible the process must be sustained through continued market pressure and/or regulation, as has been the case for the environmental agenda. This, again, cannot be achieved without a sufficient mass of frontrunners and, equally important, benevolence in the general public.

This is where partnerships can play a decisive role outside the specific context for which it has been created, be they formed within learning regions, local communities or in global settings.

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10. Learn while working, work while learning

Sylvie Grucker ([35])

10.1. Integration through work

Integration through work is intended to help unemployed people, combining particular social and occupational problems, to obtain a fixed-term contract under an integration scheme, in special facilities run under convention with the French government.

These facilities may be integration enterprises or temporary integration work agencies which are fully within the competitive market and are subject to its taxation and social security rules; intermediary associations; or social utility integration associations, called integration works. All of the above work on economic activities specific to a social project.

The objective of all these facilities, whether they have commercial status (SARL, SA, in some cases Scop) ([36]) or association status, is to help people with major problems to find stable employment or qualifying training, i.e. to integrate them socially and occupationally.

Appropriate teaching methods, based on a common-law contract of employment and paid at the SMIC (statutory national minimum wage) rate as a minimum, make it possible to achieve this objective with an efficiency that has not decreased over the years, despite major changes in both people's profiles and the economic environment.

The SIAEs (Facilities for integration through work) have a maximum of 24 months – the period of approval given by ANPE (National Employment Agency) from entry into the integration scheme – to help employees acquire the expertise, knowledge and communication skills they lack, to combat, that is, the shortcomings that have forced them into the world of the unemployable by traditional enterprises and have therefore excluded them permanently from society.

10.2. In Alsace

Unemployment has fallen massively since the end of the 1990s: at the beginning of 2001, the rate was at 5.1 % of the active population (the lowest in France), i.e. some 37 000 people.

([35]) URSIEA – *Union Régionale des Structures d'Insertion par l'Economique d'Alsace* [Alsace Regional Union of Facilities for Integration through Work].

([36]) Please refer to the end of this article for all abbreviations and acronyms

This average conceals dramatic realities: an unemployment rate of over 20 % including very long-term unemployment (22 % of all jobseekers); major unemployment among young people in areas around towns (sensitive areas); massive unemployment among women in some rural areas, It also does not take account of frontier working (close on 60 000 Alsatians work in Germany and Switzerland) by people who often have very few skills and may become unemployed if there is the slightest fluctuation in the market.

Is it the Alsatian culture of work, effort and merit that, more than anything else, has paved the way for the major growth of facilities for integration through work? The Bas-Rhin Department is now in top position in terms of the number of integration posts financed by the Ministry of Employment and the ESF at national level, and the Haut-Rhin Department is in 9th position, making Alsace one of the three French regions most active in combating exclusion through facilities for integration through work.

The URSIEA – *Union Régionale des Structures d'Insertion par l'Economique d'Alsace* – has helped to achieve this position through the partnership that it has been forging for over 10 years in order to combat exclusion.

The initial facilities for integration through work were set up in the 1980s by specialist educators, working in prevention facilities financed by the General Councils (Departmental authorities responsible in particular for social welfare). From the outset, these authorities have been involved, both politically and financially, in creating work activities with the aim of providing indispensable occupational experience for young street people – i.e. people who nobody else wanted, despite their attempts to become integrated into society. In addition, the involvement of the General Councils met their obligation to contribute to the integration of recipients of the RMI (minimum wage) by spending 20 % of the total funding awarded by the State, an obligation which is set out in law (Law of December 1988).

As economic initiative is the prime mover of these integration facilities, they have naturally approached the competent authorities: the Regional Council and local authorities.

10.3. A regional network federating facilities for integration through work...

The proliferation of the number of initiatives and the need for a common identity quickly highlighted the limits of individual measures by those initiating the project.

Integration facilities then became keen to set up a research and training network, a development viewed positively by the authorities and the State, in the framework of the fight against long-term unemployment.

This network – the URSIEA – was set up at the end of 1990. One of its first objectives was to draw up a Charter, whose preamble ends by stating: 'the goal of members of URSIEA is to take practical steps to enable every person to fulfil their potential and regain full citizenship'.

This Charter is not just a goal and a mission statement, but is also a quality guarantee for our partners: URSIEA members undertake to respect it and are taken to task if they do not. Our independence as an association is also an asset: we are able to choose our members who are all involved in integration through work and take pains to avoid political stances, except where abuses of democracy are concerned. Our activism is based on the premise that that no-one is unemployable.

Our involvement in the aims of the fight against unemployment, in the social and occupational integration of minimum wage recipients and in the creation of local enterprises, makes it possible for our project to rally (up to a point, of course) the authorities and administrations variously responsible for these objectives. We are therefore the key regional socio-occupational partner in a variety of negotiations.

10.4. ... partner representative of IAE practitioners during the negotiation of the CPER

This coordinating role was placed on a practical footing during the negotiation and implementation of the State/Region Planning Contracts (CPER).

The planning process chiefly involves the State and regional councillors who take the joint initiative to create development poles for the area. In Alsace, local authorities and the major towns are also involved.

During negotiation of the 1994-98 CPER (extended to 1999), the existence of the URSIEA – the partner representing practitioners of integration through work at regional level – made it possible to include a section on integration through work in the contract which had not been included before and is not always to be found in the French Regions.

The financial resources released (FRF 16 million divided equally between the State and the Region) made it possible to subsidise the creation of integration enterprises, the training of permanent staff, the development of local integration centres and the URSIEA. All these steps were taken following a needs analysis by our network with assistance from the institutional players.

These officially awarded resources helped us to obtain support from other financing agencies and to involve banking organisations of the cooperative and mutual type.

The high density of SIAEs in Alsace is obviously due to this support which, over and above financial aspects, offers recognition of the legitimacy of integration through work.

During negotiation of the current CPER for 2000-06, resources (slightly less: FRF 7 million) have been obtained from the State to make facilities for integration through work more professional: financing of the training of permanent employees and financing of URSIEA schemes. Regional measures offering assistance with creation have been extended to all facilities for integration through work and made more flexible; the amount has been set initially at FRF 7 million, but could be supplemented from other credit lines if necessary.

The challenge that URSIEA set itself in the negotiations leading to this CPER was to obtain financial resources for the training of people in integration. Following on from the transfer from the State to the Region of responsibility for the training of young people with low qualification levels, and assisted by the President of the Alsace Region's very favourable attitude to integration through work, we managed to obtain a very substantial aid package for the training of people in integration of all ages (FRF 17.5 million).

As the normal methods of financing by the Region were only rarely in keeping with the profiles of people in integration, it was necessary throughout the whole of the first year of implementation of the 2000-06 CPER for the URSIEA to win a key political decision: over and above direct financing for training agencies for vocational training schemes, the Regional Council decided to finance teaching work in a working situation in the SIAEs of Alsace to the tune of FRF 40 (EUR 6.10) per trainee hour. In practice, the projects presented will have to follow a predetermined training plan; the URSIEA will be responsible for certifying the service provided. This is a first in France and a genuine victory for our sector, whose teaching role has finally been recognised and has gained the resources needed for its qualitative and quantitative development.

This line of financing is encouraging SIAEs to be creative. Training schemes, discussed below, are proliferating to such an extent that the package may well prove to be insufficient.

All the resources implemented under the CPERs are supplemented by the resources available under national policies, which explains the current decline in State involvement. In practice, increased and stable financial support for the various facilities for integration through work will now be provided under the 1998 law against exclusion.

10.5. URSIEA, a regional occupational organisation in the economy of solidarity

We are a regional organisation of practitioners, of entrepreneurs of integration through work, whose purpose is to meet the needs of our members (80). We help them to progress and to become more professional, to promote their social and economic activities and to defend their interests. Our members' contributions account for only 15 % to 20 % of our total budget, but this amount provides us with a degree of political independence since it pays for our basic operation. Our leadership sessions, set-up assistance, support for professionalisation and

regional observatory tasks are financed by the State and the ESF and by the Regional and Departmental authorities.

While our work is obviously of benefit to integration facilities that are not members of the network, we are nevertheless very representative: from 70 to 90 % of SIAEs, depending on whether they are integration enterprises or intermediary associations.

We are part of the economy of solidarity: our development is underpinned by solidarity with people who are being excluded, by harmony with local needs, and by commitment to sustainable development. These criteria are used to analyse all plans for the development of facilities, which also mobilise the various players in the area in question.

A departmental body – the CDIAE: *Conseil Départemental de l'Insertion par l'Activité Economique* – composed of politicians, representatives of employers' organisations and workers' trade unions, authorities in charge of employment and social welfare and qualified people (often representatives of integration facilities) is responsible for approving projects on an annual basis. The URSIEA plays an active part in this Council and gives qualified opinions on the various projects, thereby helping to ensure that the socioeconomic partners have accurate information and are fully briefed.

10.6. A major push to train people involved in the integration process

The aim of our proposals, based on the experience and needs analyses of the SIAEs and their integration employees, is to counter the tendency on the part of the regional authorities to target only those who are able directly to enter qualifying training, disregarding people who do not possess the minimum criteria for enrolment. This stance on the part of the Region is a direct outcome of its concern to find an efficient answer to the needs of traditional enterprises. We are not against this objective which we support in the long term. We feel, however, that it is crucial to help people to progress, so that those for whom the award of the initial qualification level – the CAP (vocational aptitude certificate) – is a far-off or even unenvisageable prospect are not excluded from the process.

We have – with some difficulty – managed to make Alsatian regional politicians (who tend to see qualifying training as the only answer) more aware of vocationally-targeted training. As mentioned above, the recognition of training schemes preparing people for work under the current CPER is a major step forward. Our task in these schemes is to provide the instruction that people need about the life of an employee: respect of working hours, colleagues, the hierarchy and the collective good that is an enterprise. This whole strategy, which comes before training in occupational tasks, does not rule out formal certification of knowledge and, more ambitiously in view of the initial levels of integration employees – over 80 % are below level V and 50 % below level VI – the introduction of regional validation of occupational experience.

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Regional councillors are typically not keen on schemes that are too social; they feel that learning about living together, relational skills, behaviour and solving problems connected with the family, finances, accommodation and health do not have a direct enough connection with occupational integration.

We showed – in a study conducted with CEREQ BETA ([37]) in Strasbourg – that socialisation training has to be part of vocationally-targeted training. In fact it is indispensable, as it tackles problems which constitute genuine obstacles in the path of integration into a permanent job.

We are therefore working with the authorities responsible for social issues: the General Councils and, in some cases, the Labour Directorates.

Until now only training schemes run by training agencies could be co-financed by the Region. We had to put forward a whole range of arguments and evidence and be very persuasive to make people accept the advantages of training people in integration at the workplace, making learning a method of working.

The issue was how to take teaching time into account and how to organise mentoring.

The strategy we propose is as follows: following location of a site, instruction is given in specific practices in the context of preparation for employment, either on entry into the integration scheme, or to provide occupational skills that normal activity has not required, or to optimise exit into recruitment. Regional financing (FRF 40, i.e. EUR 6.10 per hour) will make it possible to finance a specialist mentor and to run these sites without the normal pressures of profitability. Output will be sold at normal cost, even though production and training costs will have been higher than the sale price.

The difference in respect of on-the-job training is that teaching time is organised. The aim is not to make a profit, but to seize the opportunity that work offers for teaching an occupational skill, attitude or technique. The aim is to organise a work activity, not in an artificial way, but in the context of an order from a customer. It is only through this activity that people in integration can progress and, in the long term (in some cases the very long term), prepare themselves for the conditions of employment in traditional enterprises.

All economic activities of integration enterprises must be competitive and must therefore accept market rules. Even in the case of facilities organised in the social utility area – which are not in competition with the traditional economy – customers, whoever they may be, are aiming to achieve a better price/quality ratio. As a result, it is essential for the social work of the SIAEs to be financed by institutional partners. Obtaining sufficient financial support to cover the actual cost of social work is therefore a priority for a network such as URSIEA. It is for this reason that we are playing an active part in national negotiations (in particular in the

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([37]) *L'Action sociale des Entreprises d'Insertion et des Régies de Quartier*, in cooperation with Éric Fries Guggenheim, CRA CEREQ Alsace, URSIEA, August 1999.

context of the CNEI) with the State and pushing for local negotiations with the Region and the General Councils.

Some public customers are trying to include social preference clauses in their contracts so that the employment of people facing major problems becomes a criterion for selection. We are impatiently awaiting the implementation of the new Code of Public Contracts in this area. Contracts will not be reserved for integration enterprises, but should enable the employment of people in the process of exclusion by traditional enterprises or by integration facilities. Interesting schemes have been run in this respect, especially in the major works undertaken in Strasbourg: IPE IV, Tram.

10.7. Involving integration employees in the training process

Previous repeated failure at school and long histories of one traineeship after another are all factors that make it impossible immediately to offer an integration employee a training scheme.

Recruitment into an integration facility means having a boss, a payslip and being a worker among other workers. The contract of employment is also an asset, with its rights and obligations, and is the driving force and specific feature of the SIAEs in comparison with other integration schemes. People are waged employees and take part in an objective – and objective-based – way in creating the turnover of their (integration) enterprise or association.

Training may be included as an element of the employment contract. Although this solution is effective in some cases, some people may absolutely refuse to enter into a contract.

Integration enterprises offer people work to give them a taste for learning.

This taste for learning involves:

(a) learning what they are capable of: discovering their abilities and aptitudes;

(b) learning that they can learn;

(c) learning that they need to learn.

Adapting the training supply is not the only way of involving people in integration.

We observed this in the case of several Alsatian SIAEs and commissioned a study entitled *Quelles actions permettent de donner l'envie d'apprendre à des personnes en insertion* [What measures can be used to provide people in integration with a taste for learning] ([38]).

([38]) In cooperation with Pascal Heidet SA, URSIEA November 2000. Study financed under the Departmental Integration Fund of the DDTEFP of Bas-Rhin. Steering committee: DDTEFP, Regional Council, General Councils, PLIEs of Strasbourg and Mulhouse, representatives of Alsace facilities for integration through

This study, financed by the Bas-Rhin Labour Directorate, was conducted by a collective formed by managers of integration facilities and representatives of the State, the Regional Council, the General Councils and the PLIEs. It was commissioned from a consultant specialising in audits of traditional enterprises but with an interest in integration through work. The URSIEA is currently trying to implement the study's recommendations, for which purpose it has recruited an employee for a six-month period. This work will be financed by the Labour Directorates of the two Departments of Alsace. We are keen to stress the following points from the consultant's report and recommendations:

(a) The constraints experienced by integration facilities themselves are a major curb on the ability to train: if the employer is not motivated, how can the employee be motivated?

  (i) It was suggested that we should tackle this problem by creating a post for a facilitator within the regional network (URSIEA) who would help to draw up dossiers in terms of methods and therefore to make it easier to obtain funding. This proposal has been partly implemented and is providing concrete results: two dossiers are being examined by regional councillors, one of which is also being examined by the ESF.

  (ii) Coordinating action by financing agencies and providing them with a common and consistent vision is obviously the responsibility of the network. For this purpose, however, facility managers have to be involved in formalising the teaching schemes that they often conduct without a teaching curriculum, without evaluation and disregarding the need to upgrade (formal certificates, objective recognition).

(b) Improving the standards of the mentoring staff through training for trainers, and by setting up groups for exchanges of experience and comparisons of teaching methods.

(c) Selling the taste for learning to integration employees: very simple measures such as the use of a vocabulary avoiding terms such as school, teacher, exercises, etc., and giving priority to terms such as leader, workshop, training, etc.; the posting of motivational slogans in enterprise workshops or even a genuine publicity campaign in all premises; meetings/seminars attended by former students.

(d) Building on the training schemes run by integration facilities by honouring employees: end of scheme prize, official distribution of course certificates, by involving the usual caseworkers: social workers, ANPE officials and by inviting the local press and employees' families.

(e) Not neglecting the outside training supply, but taking steps to ensure that it is in keeping with people's needs and abilities.

It is difficult but possible to stimulate an appropriate supply of training: for instance, a scheme leading to the CQP in cleaning was drawn up by the Strasbourg GRETA, a Ministry of

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work, URSIEA managers. Available from URSIEA, 68 avenue des Vosges, F 67000 Strasbourg. E-mail: URSIEALSACE@wanadoo.fr.

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Education continuing training scheme, and several integration enterprises (district coordinators). Under this modular scheme, the various units can be acquired over five years and its operating methods have been adapted, allowing people to come and go repeatedly, so that they are in keeping with the problems and potential of employees and integration facilities.

In cooperation with the Mulhouse AFPA (supervised by the Ministry of Labour), URSIEA drew up a process for the certification of occupational techniques on the actual site of the integration facility. Since it involved mentors in the strategy and helped to make employees feel more involved through their familiarity with the site of the operation, this scheme was very successful, especially as these official certificates are part and parcel of the trade reference profiles ([39]) .

Such schemes are useful, first and foremost because they step up employees' professionalism, but also because they bring about changes in State training agencies, which are the only bodies able to validate occupational experience.

10.8. Involving traditional enterprises

The major labour needs of enterprises and the favourable economic situation are helping us to meet the needs of professional circles. While our contacts with the Chambers of Trade, etc., were limited for a number of years to general exchanges of information and in some cases to the treatment of complaints of unfair competition, we have been able to forge a much more active partnership in recent months. The Chambers of Trades wanted to meet URSEIA to think about recruitment by integration facilities in connection with their own labour needs. The professional agricultural organisations accepted that working conditions in some sectors could be arranged to enable the use of seasonal labour. The fact that craftworkers and farmers had been forced, as a result of the upturn in the economy, to recruit people that they had previously rejected, has probably done much to make them think about the notions of competence and employability.

Traditional entrepreneurs are also examining with a much less critical eye than before the methods tried out by the integration facilities to integrate 'those people'. These entrepreneurs are now forging links with integration facilities and the URSEIA.

These new prospects for employment at the end of an integration scheme are all assets in stimulating a taste for learning and an effort to learn among people in integration.

([39]) Trade Reference Profiles: reference profile for qualifying training by AFPA validated by the award of the CFP (Vocational training certificate), a qualification awarded by the State. Certificates of completed attendance or of vocational standard may be issued when the CFP is not awarded.

10.9. In conclusion: the force of a regional network

The personal links that led to the creation of the URSEIA network: links between facility managers, with institutional officers and politicians, have gradually given way to more institutionalised relations with the various partners. URSEIA, as the representative of the Alsace SIAEs has, for instance, obtained seats in various bodies such as the Alsace Economic and Social Council, the Departmental Councils for Integration through Work, COTOREP (guidance for the disabled), the ESF Objective 3 steering committee, the PDIs (Departmental Integration Plans) and several others.

Integration facilities themselves often take part in the Local Integration Committees (CLIs) in their own areas.

Alsace is, as a result of its small size, a region which lends itself to a pooling of energies. While elsewhere in France regional associations have been set up, dealing with each type of integration facility (regional union of integration enterprises, coordination of intermediary associations, etc.), we decided to bring all the players in economic integration within the same association. This choice has proved to be very appropriate and has legitimised us as a professional organisation for integration through work, which is envied by a number of other French regions.

This type of grouping has an impact on the quality (and on the quantity ...) of the work carried out with our partners and members: the pooling of good (and bad!) practices and analysis of the schemes run are a crucible for dynamic development and a capacity for innovation.

Glossary

AFPA:	Association for Adult Vocational Training
ANPE:	National Employment Agency
CAP:	Certificate of Vocational Aptitude
CDIAE:	Departmental Council for Integration through Work
CEREQ BETA:	Alsace associate centre of the Qualification Research Centre – office of theoretical and applied economics of the Louis Pasteur University of Strasbourg
CLI:	Local Integration Committee (for minimum wage claimants)
CNEI:	National Committee of Integration Enterprises
COTOREP:	Technical Committees for Guidance and Occupational Redeployment
CFP	Certificate of vocational training: the CFP is a State certificate of level V (level 2 of the International Standard Classification of Education – ISCE) issued by AFPA on behalf of the Ministry of Labour
CPER:	State/Region Planning Contract
CQP:	Vocational Qualification Certificate
EI:	Integration Enterprise
ESF:	European Social Fund
GRETA:	Grouping of establishments (Federation of national education establishments involved in continuing training)
IAE	Integration through work
IPE IV:	The new European Parliament building in Strasbourg; its construction will have been one of the largest ever French building works and will have needed over four years of work
PDI:	Departmental integration plan (for minimum wage claimants)
PLIE:	Local plan for integration and employment
RMI:	Minimum wage
SA:	Public limited company

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SARL:	Private limited company
Scop:	Cooperative production company
SIAE:	Integration through work facilities
SMIC:	Statutory national minimum wage
Tram:	construction of the Strasbourg tramway, started in 1990, the second phase of which was completed in 2000
URSIEA:	Alsace regional union of integration through work facilities

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11. Learning region as an alternative for enhancing the economic and social dimension in tourist areas. Some reflections ([40])

Vicente J. Molés Molés ([41])

11.1. Context of the ongoing work of the tourism unit (European Commission) in the field of learning

The tourism sector is a very complex industry, encompassing a wide range of economic activities in every region of Europe and involving a substantial investment in human capital. This is the reason why the Commission Communication on 'Enhancing Tourism's Potential for Employment' (COM (99) 205 final. 28.4.99.), recognises the issue of 'up-grading human resources in tourism' as a key factor to improving both the competitiveness and employment opportunities within tourism.

The Council of (Internal Market) Ministers of 21 June 1999 (C/99/201 Luxembourg 21.6.99), in its conclusions, recalled the importance of better integrating the needs of the tourism sector into other Community policies and invited the Commission and the Member States to work together on four priority issues ([42]), among them the issue of 'Improving training in order to upgrade skills in the tourism industry'. In order to follow up the Council Conclusions of 21.6.99, five Working Groups on the four priority issues were launched.

WG B 'Improving training in order to upgrade skills in the tourism industry' started its work in February 2000 and was formed by experts coming from the Member States. In the current year it has been expanded to include some experts representing stakeholders of the tourism sector ([43]). In its work, WG B seeks a clear diagnosis of learning on tourism at EU Level, as a good basis for developing future strategies and recommendations. For coping with the challenges identified, WG B is working in the concept of learning regions as a way of offering a holistic support to the sector in tourist areas. This paper gives a short overview of the work

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([40]) This contribution does not necessary reflect the opinion of the European Commission. It is the result of the debates and the work carried out by Working Group B on 'Tourism and Employment' (see annexes) and in some parts it reflects the personal opinion of Vincente Molés, coordinator of this Working Group.

([41]) European Commission, DG Enterprise/D.3: Tourism Unit, e-mail: vicente.moles-moles@cec.eu.int

([42]) Four priorities: Facilitating the exchange and dissemination of information, notably through new technologies; Improving training in order to upgrade skills in the tourism industry; Improving the quality of tourist products; Promoting environmental protection and sustainable development in tourism.

([43]) See Annex 1: mandate WGB; Annex 2: members of WGB.

carried out by WG B and the ongoing reflections on the 'learning regions' concept, paying special attention on the role of learning centres.

11.2. Main findings of working group B 'Improving training in order to upgrade skills in the tourism industry'

Working group B has planned its approach starting from the general concept of learning. Learning as the widest range of systems/approaches for developing Human Resources' knowledge, skills and competences (formal, non-formal and informal learning) in order to enhance the competitiveness of tourist enterprises, focusing especially on SMEs (micro-enterprises) ([44]).

The main learning needs regarding the principle categories of workforce of the different stakeholders in tourism, especially workers and managers of SMEs, show that tourism is on the one hand still characterised by a workforce with a relatively low level of skill for the majority of jobs in the basic subsectors (e.g. Horeca), in particular regarding SMEs. On the other hand there exists a new demand for additional skills, for example ICT, and the big players and larger enterprises have normally found ways and means to develop a skilled labour force. The principle obstacles encountered in upgrading skills are: lack of labour force and high level of staff turnover; the low image and particular working conditions of the tourism industry as a place to work, including seasonality; lack of basic qualifications that could be upgraded; reduced competitiveness in micro-enterprises due to poor development of labour ([45]).

After this first diagnosis, the picture shows that there is a direct correlation between learning, employment and labour environment, it being necessary to take into account the economic and social dimensions in parallel. The challenges detected could be summarised in three priority areas:

(a) attracting skilled labour to the sector;

(b) retaining and developing skilled labour in the sector;

(c) supporting micro-enterprises at regional and local level for improving competitiveness through the development of labour.

Strategies and measures designed to upgrade skills in the tourism industry show a trend towards more holistic solutions based on partnerships and dialogue between training institutions, the tourism industry and other major stakeholders, like public authorities. They go

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([44]) The reason for that starting point was to cover all the issues reflected in the mandate of the WGB without entering at that stage into the different learning systems and terminology across the EU (These differences have been considered as good practices/solutions at the appropriate step). The same must be understood when speaking about learning centres.

([45]) See Annex 3: main factors which could affect learning in the tourism industry and learning needs.

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beyond training, and regard 'learning' in a wider sense. As said, it is necessary to take into account the economic and social dimensions when wanting to upgrade skills. This can be developed towards a common philosophy on learning, which involves all tourism and training stakeholders in the learning and innovation process through active practical cooperation and networking, resulting in improving competitiveness. In this context Working Group B has taken into account the so-called 'learning region' concept in order to benefit from existing ideas.

The conclusions of the working group were formulated with regard to the three priority areas mentioned above. The actions recommended are intended to be complementary, adaptable to the diversity of the EU, concrete for acting in a short term but with long-term objectives, flexible enough to embrace the challenges already detected and dynamic for coping with the future ones. They could be summarised as follows:

(a) A permanent observatory on learning, employment and labour environment for tourism: as an instrument for gathering, monitoring, generating, providing updated information and fostering debates on key issues on those matters in order to improve knowledge (qualitative and quantitative), with the main objective to provide strategic information for ensuring sustainable competitiveness for tourism.

(b) A handbook for learning areas in the tourism industry: practical guide for action to transform learning into innovation, taking into account the fragile reality regarding human resources (economic and social dimension); considering a way (mix between: strategic information, learning and advice/guidance) to provide learning which is more complex than classic training, and using bottom-up / top-down approaches, partnership, cooperation between all stakeholders concerned.

11.3. The concept of learning area (learning region) ([46])

In general, the concept of the learning region is focused on achieving social and economic objectives in an integrated manner. Regional learning initiatives entail empowering local communities (through the involvement of people from different interest groups) to enhance their living standards and quality of life, both from economic and social points of view ([47]).

Learning regions, regional innovation, systems of innovation, technology transfer, knowledge transfer are different terms being used more or less as synonyms for the same complex of

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([46]) During the debates of WGB it was agreed to substitute the term 'learning area' for 'learning region'.In spite of the term 'region' being used in a much wider sense than that of a statutory or legally defined region, it provoked continuous misunderstandings. The word 'areas' is considered better compared with others such as 'territory', 'tourist destination', 'space', etc. for similar reasons. The experts suggested the following translations for this term: French: 'espace de professionalisation'; German: 'Lerngebiete'; Spanish: 'áreas de aprendizaje'

([47]) From: Reflection papers drawn up for *Agora-Thessaloniki XI*. Barry Nyhan, Éric Fries Guggenheim, Cedefop.

challenges: How to contribute to and support – at a regional level – the stimulation of learning/innovation in enterprises – in particular SMEs.

The learning region is a system, a structure that can ensure that internal company processes and practical cooperation between enterprises become interrelated with existing knowledge bases and the R&D infrastructure in the region in order to upgrade learning, innovation and competitiveness. The concept of a learning region should (as examples):

(a) enhance/ develop the competence of regional clusters of tourism enterprises by involving them in innovative cooperation with regional and local authorities and research and educational institutes;

(b) identifying new roles to be played by existing education and training agencies;

(c) establish systems/structures that enable enterprises and R&D institutions to cooperate with other actors in the regional (national) innovation/learning system;

(d) ensure that educational and training institutions (like VETs) eventually can act as catalysts for the production of new ideas;

(e) ensure that the role of mediators enabling different actors to work together will be undertaken;

(f) enhance societal interactive learning;

(g) develop the know-how to turn ideas into reality;

(h) facilitate innovative processes, exchange of knowledge, the learning skills of the enterprises and the different actors;

(i) anticipate training needs and secure their provision through integral training concepts;

The existing approaches show the need to rethink training and apply the broad concept of learning for individuals as well as for enterprises to be able to work more systematically with the development of human resources in order to respond to the challenges from increased competition on quality and the structural developments resulting in new job profiles. Also the good practices identified show a trend towards more holistic solutions to solve the skill needs problems building on partnerships and dialogue between learning institutions, the industry and other actors such as the social partners and public authorities.

In a learning area, enterprises cooperate with each other, with educational institutions such as VET-institutes, universities, public authorities, professional organisations, the social partners and business service institutions (public, private/public) in order to improve competitiveness through better learning and innovation for individuals as well as for enterprises.

11.3.1. Improving the idea of learning area. A good practice: Spanish case – CDTS

The *Centres de Turisme per a la Qualificació Professional* (CDTs) is a network of seven learning centres placed around the Valencian Community (Spain), which belongs to the

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Valencian Government (managed by the Valencian Tourist Board). The mission is 'to increase the competitiveness of Valencian tourism companies through ongoing training for professionals in the trade ... for boosting innovation and constant improvement of tourist products ...'. The main objectives are: to put learning closer to the enterprises; to cope with the diversity of training needs in the region, to enhance practical benchmarking between professionals and to support research and implementation for innovation.

The most relevant characteristics that define the project are the following:

(a) the learning centre is the tool for offering training to unemployed people and professionals (two different programmes) and also for supporting education programmes;

(b) net of centres placed in the most important tourist areas around the Valencian Community: very close to the tourist industry;

(c) full involvement of the stakeholders in the training centres: advisory committee in each centre to ensure the match between the training offer and the real needs in the local/regional industry. The learning centre is also involved in other organisations' advisory committees;

(d) free training: stimulating the SMEs and avoiding funding problems;

(e) tailored training for companies/public administration in key matters (e.g. quality): training, implementation, mentoring and following up;

(f) strategic management information: actions to inform and raise awareness on key topics;

(g) full involvement of tourist industry professionals in the activities of each training centre;

(h) continuous exchange of information between centre and professionals;

(i) setting up professional associations in technical matters as a result of the training actions with the full support of the training centre (headquarters in the training centre);

(j) continuous forum for professionals (practical benchmarking);

(k) intensive training activity within low season. Courses adapted to the professionals' working schedule;

Key concepts to take into account within the concept of learning area derived from that good practice:

(a) facilitating learning structures for the tourism sector;

(b) providing tailored learning and support to the tourist sector. Anticipating skills/training needs;

(c) learning centres as a place for cooperation between the different stakeholders through the training activities;

(d) stimulating enterprises and employers to take training;

(e) facilitating innovation. Integral programmes for supporting enterprises: learning, consultancy, guidance and support;

(f) learning centres as place for linking enterprises and Universities/R&D structures. Giving strategic information (transmitting innovative concepts to the reality and vice versa);

(g) learning centres as place for facilitating permanent contact between professionals. Practical forum or benchmarking system;

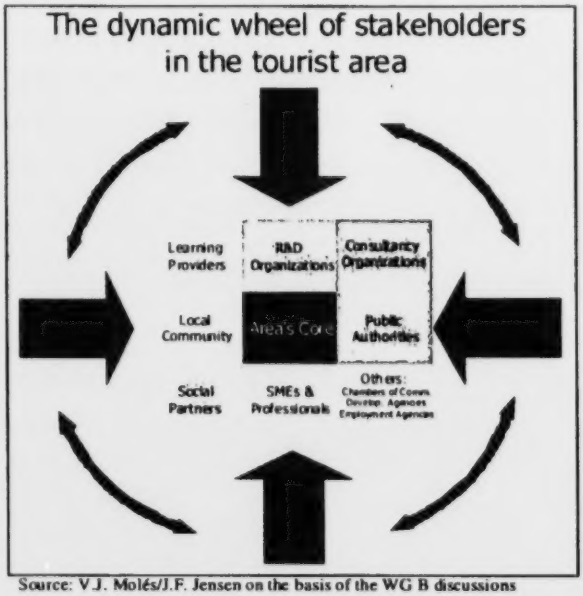
(h) learning centres as a central body in the area.

11.3.2. The basic elements of learning area: the three dynamic wheels

From these preliminary ideas and the good practices analysed in the WGB, it seems that there is a common philosophy on learning for developing the 'learning area' philosophy, which can be summarised by 3 complementary critical elements: Involvement of all stakeholders; Holistic way to provide learning; Improvement of factors for competitiveness.

Involvement of all stakeholders: the dynamic wheel of stakeholders in the tourist area

The learning area builds on the involvement of all relevant stakeholders concerned in the solving of the challenges and problems identified for the area. Cooperation is essential and the partnership /networking between the actors could be more or less formal according to the tradition and culture of the area. SMEs (micros), tourism professionals and employees are naturally the most important target group and to ensure ownership and responsibility. In 'learning area' process it is essential bottom-up process but, on the other hand, the bottom-up process needs political and public authority support as a basis for long lasting support and a holistic view on the number of initiatives that might occur (top-down).



Source: V.J. Molés/J.F. Jensen on the basis of the WG B discussions

As said, active participation and interlinkage between all actors in the area is necessary (dynamic wheel), but the coordination and management role of a leader is also needed (that could be the learning centres, as in the Valencian approach) as is reference body to act as a catalyst for building the necessary cooperation of stakeholders. In order to be flexible and open to the different realities of the tourist areas this contribution introduces the term 'area's core' as the body who acts as a leader and central point in the 'learning area' process.

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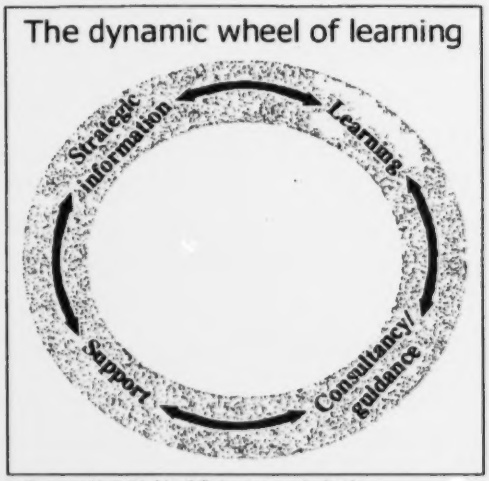
A holistic way to provide learning: the dynamic wheel of learning

The 'learning area' concept bridges the gap between training systems and the learning processes in the industry in order to improve knowledge transfer between research and education institutions and the industry. But these links and processes very often need support and guidance to be successful when looking on the great share of micro-enterprises involved – it could be political support, provision of facilities, financial support, etc. The processes need relevant content in order to really motivate enterprises for development. Strategic information for enterprises is therefore essential if they are to participate and invest in learning.

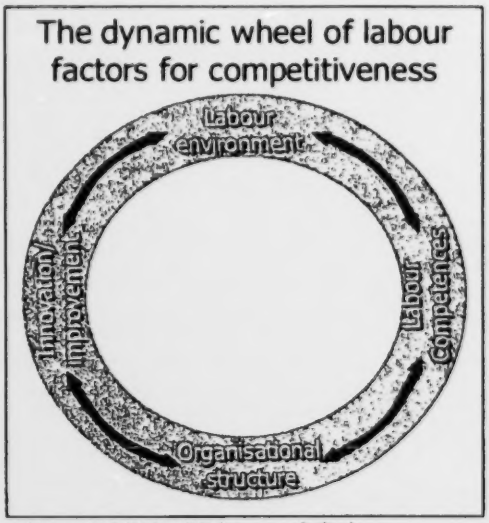


Source: V. J. Molés /J.F. Jensen on the basis of the WG B discussions

In summary, the dynamic wheel of learning shows the necessity of offering strategic information to the industry for management decisions and for selecting the key learning topics. Learning process needs guidance, consultancy and mentoring for transforming knowledge in innovation and support at all levels for running the process.

Improvement of factors for competitiveness: the dynamic wheel of labour factors for competitiveness

When looking at the competitiveness of enterprises from a human resource perspective, three factors are intimately integrated with innovation and continuous improvement of the company processes: labour competences, the organisational structure and the labour environment. The value of the labour competences and the ongoing learning process is closely linked to the organisational structure of the enterprise. The organisational structure should help the enterprise to engage, combine and use the individual labour competences in an organic manner. And provided there is a sound labour environment, the relationship between the individual and the organisation can result in continuous improvement as well as innovation.



Source: V. J. Molés /J.F. Jensen on the basis of the WG B discussions

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For transforming learning in innovation the three wheels must act together; all of them being dynamic and interactive elements. These elements play a critical role in three contexts: inside the enterprises, inside the tourism sector and in the tourism sector environment (support sectors). All of these contexts are interlinked: that is a very complex reality ([48]).

These three elements facilitate the achievement of the necessary holistic approach of learning area (through learning, human resources, innovation and the influence on competitiveness) for enhancing the economic and social dimension in tourist areas.

11.3.3. Analysing the 'learning area' concept: activities, stakeholders, target groups and networking

The concept of learning area for the tourism sector could be defined as an approach which looks for a holistic solution at the local/regional level to the main challenges of the tourist sector (especially micro-enterprises), and for improving its competitiveness through learning and innovation. That improvement should contribute to the growth of the local economy and the sustainable development of tourism, generate sustainable employment and improve the labour environment and careers perspectives of the local population involved in or entering the sector.

That definition takes into account the economic and the social dimensions of the tourism sector and the tourist area. That philosophy embraces a set of key actions/activities that without being a close list could be summarised as follows:

(a) providing learning;

(b) improving skills;

(c) improving the quality of learning;

(d) enhancing/supporting innovation and continuous improvement in the sector;

(e) promoting shared knowledge;

(f) detecting learning needs and acting as a catalyst in the areas;

(g) providing strategic information, raising awareness on key issues and guidance;

(h) facilitating a bottom-up process: building partnerships, enhancing cooperation between the stakeholders concerned and enhancing the aggregation of the tourist product (on the basis of learning actions);

(i) supporting the insertion of skilled people in the sector (attracting, training and inserting);

(j) develop a dynamic approach to local demand for tourism training in order to attract labour;

([48]) Which should be taken into account when identifying and involving the relevant stakeholders: the first dynamic wheel.

(k) support and develop specific programmes for managers in SMEs and micro-enterprises focusing on Human Resource Management. Providing support for destination management.

Of course, central to these activities is the holistic way of providing learning defined in the previous chapter – the dynamic wheel of learning. This is the way to transform knowledge in innovation and continuous improvement in the sector and it must also enhance the social dimension of the people working in or entering the sector. For achieving sustainable solutions the factors behind the challenges existing in the area must be taken into account ([49]).

The engine of that complex approach is the necessary participation and partnership of all stakeholders concerned, as mentioned previously. The partnership should consist of a balanced and representative selection of partners drawn from the different subsectors of tourism, socioeconomic sectors in the area concerned with links to tourism and public organisations. The stakeholders may vary from area to area due to differences in culture and traditions, but the following could be an example:

(a) SMEs (micros) (managers and workers);

(b) educational/research institutes;

(c) regional development organisations;

(d) public authorities;

(e) social partners;

(f) local community;

(g) Chamber of commerce, etc.

The relevance and effectiveness of the partnership is to be assessed in terms of the transparency and clarity in the allocation of tasks and responsibilities. The capacity of the partners to carry out the tasks assigned to them, and the effectiveness of the operational and decision-making arrangements must be guaranteed. The members of the partnership will be primarily locally based but will, of course, make links with resources outside the area if the competence and knowledge needed is not available with in it.

The target groups will vary according to the specific problems/challenges of the area but in general we are talking about:

(a) SMEs (Managers, owners and workers);

(b) professional associations;

(c) regional/local development organisations (e.g. tourist boards);

(d) local authorities.

([49]) See Annex 3: the main factors affecting tourism, identified by WGB.

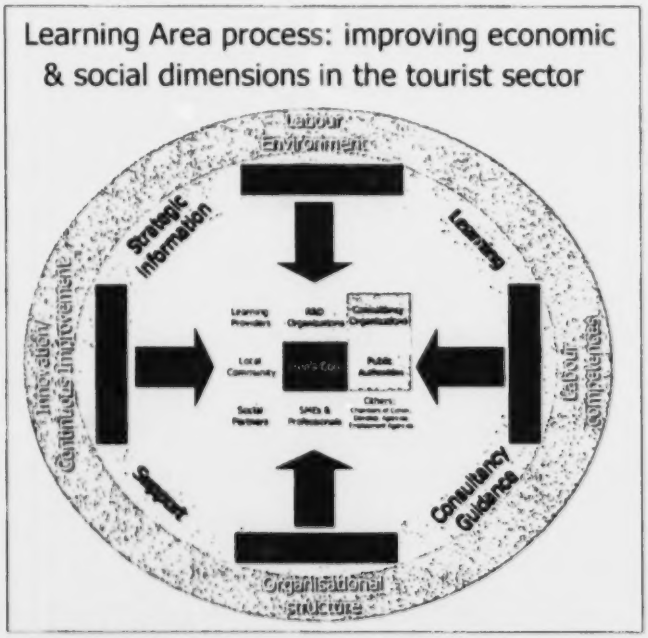
The exchange of achievements, experience and know-how between all interested parties in the area is a priority in the 'learning area' approach, but could also be useful between different learning areas. At national level as well as at EU-level it could be appropriate to put in place the structure necessary for organising a 'learning areas' network in order to:

(a) collect, analyse and disseminate information at national level on good practice which is transferable;

(b) organise exchanges of experience and know-how, in particular for less-advanced areas, which could benefit from the knowledge gained by more experienced areas;

(c) provide technical assistance for local and transnational cooperation.

This networking could be useful for enhancing and improving learning area at EU level and facilitating practical cooperation like exchanges of staff between learning areas. It also could facilitate innovation and improvement in the tourist product value-chain (for example, between areas of tourist origin and destinations).



Source: V. J. Molés /J.F. Jensen on the basis of the WG B discussions

In summary, the 'learning area' philosophy is a dynamic process formed by the combination of the three wheels defined, where the stakeholders are in the centre of the system being coordinated by the area's core. The dynamic wheel of learning is propelled by those actors through the dynamic partnership, networking, coordination, actions and top-down and bottom-up approaches. The way to improve the economic dimension of the sector necessarily goes through human resources as the most important factor for transforming knowledge in real innovation for enhancing competitiveness. The approach must also consider the challenges from the social perspective in order to achieve sustainable solutions. As a result we have this complex and dynamic system, which must be continuously developed and improved;

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for that reason, the system must be flexible and adaptable to the challenges continuously detected.

11.4. The role of learning centres in the learning area – The area's core

The complexity of the 'learning area' process due to the actions to be implemented and the actors involved make the existence of a leader necessary, becoming the centre of the defined 'dynamic wheel of stakeholders in the tourist area'. The actors who could play the leader role should be chosen on the basis of the reality in the area, due to the variation in culture, structure and traditions.

The leader should be able to devise and implement a development strategy for the area based on consensus and the active participation of the stakeholders involved. The leader should have the ability to act as a catalyst, be cooperative, capable of enhancing the dialogue, an integrator, impartial, etc., to facilitate the implementation of the learning area. Also, the ability to administer public and private funds. The following stakeholders could have the role as leader:

(a) regional development organisation;

(b) local/regional authority;

(c) learning centres;

(d) local social partner.

The leader should act as the central point of the learning area, becoming the so-called area's core. This is a concept that goes further than the driving and coordinating role: it shows the need of a physical place/structure where the different stakeholders could meet and exchange knowledge, facilitating a practical benchmarking process. In that sense a virtual organisation or a virtual network could be set up to support the learning area and the possibility of providing e-learning, but that seems not to be enough.

Source: Self-elaborated

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Of course the local and regional authorities play an important role, giving political and financial support but 'learning centres' is a key aspect due to learning being the key factor of that approach. Creating physical structures on the spot (net of learning centres very close to the sector) seems to be an alternative for building the area's core. Such centres do not look like a classic training provider, but something else.

The role of the learning centres as a central point – Area's core:

(a) enhance the sector awareness (enterprises and professionals) on the need to receive training (learning should be seen as an investment more than a cost);

(b) offering high quality learning/strategic information for coping with the real needs of the sector;

(c) bridge between the strategic public bodies and the sector;

(d) bridge between the R&D organisations and the sector (circle of innovation);

(e) transferring knowledge to the reality and vice versa;

(f) linking the theoretical and innovation concepts with the reality of the industry;

(g) broker of learning (in the widest sense), innovation, consultancy/guidance and support;

(h) anticipating learning needs;

(i) building partnerships between all the stakeholders concerned;

(j) integral support to the enterprises/organisations: information, training, implementation and guidance;

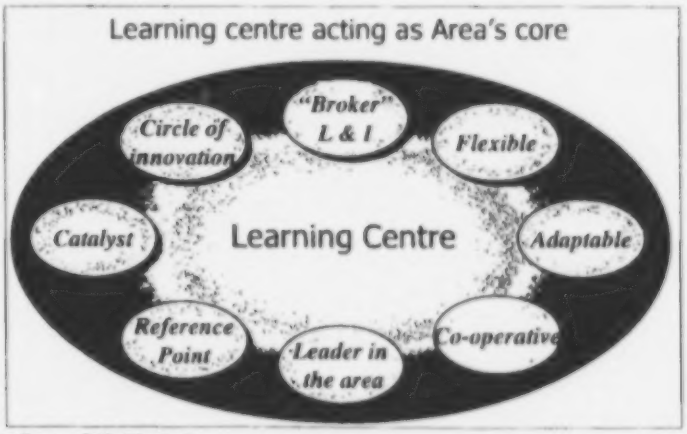
(k) support for the tourist destination management;

(l) reference point for the enterprises/professionals/stakeholders of the tourist destinations (enhancing the integration of tourist destinations as a tourist product);

(m) continuous forum for professionals (place for practical benchmarking);

(n) inserting new people in the sector through learning /'selling people' actions;

(o) improving the image of the sector. Awareness raising campaigns, not only to the sector, but also to society in general.



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The role of the learning centres. Some suggestions/ways/examples for implementing the above-mentioned ideas:

(a) very active leadership in the area, by the leader of the learning centre. Strong public relations, marketing campaigns and serious work;

(b) *Tourism Advisory Committee in the learning centre*: formed by all stakeholders concerned, supported by very active and strong informal relations;

(c) in the same way the leader of the learning centre must be involved in other advisory bodies (Councils, Chamber of Commerce, Professional associations, development agencies, employment agencies, educational structures, etc.);

(d) offering tailored and flexible learning;

(e) circles of innovation within the learning centres. Formed by professionals in the specific topic as a result of a specialised seminar and supported by teachers/professors (R&D organisations). (Enhancing professionals associations in the centre for technical matters: support and cooperation between them and the centre);

(f) short and specialised informative conferences on very innovative subjects. Followed by longer seminars and integral programmes if required (strategic information);

(g) integral programmes: informing, training, support for implementing specific topics (e.g. quality). Complete support (including funding) for pilot and demonstrative projects in the area;

(h) practical forums/benchmarking between the professionals. Enhancing the contact between professionals in the learning centre;

(i) facilitating the contacts between enterprises and new skilled labour entering the sector. Organising events inside centre and outside were new people could practice in real conditions in front of/with professionals;

(j) close cooperation with other bodies providing learning (avoiding duplication and negative competition);

(k) close cooperation with the bodies responsible for employment and enterprises. Bringing new people into the sector through training and facilitating appropriate contacts between industry and the new labour.

(l) giving training and information to the decision-makers in the area;

(m) learning centre should be flexible, adaptable, cooperative, leader for the sector, supportive (for local development), close to the industry, open to all stakeholders ...

11.5. Conclusions

The concept of learning area for the tourism sector could be defined as an approach which looks for a holistic solution at the local/regional level to the main challenges of the tourist

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sector (especially micro-enterprises) for improving its competitiveness through learning and innovation. That improvement should contribute to the growth of the local economy and the sustainable development of tourism, generate sustainable employment and improve the labour environment and careers perspectives of the local population involved in or entering the sector.

The 'learning area' approach is based on three basic pillars (dynamic wheels), taking into account the economic and social dimension in the sector and the area:

(a) the dynamic wheel of stakeholders in the tourist area: involvement of all stakeholders in the area through a coherent partnership, networking, coordination, actions and top-down and bottom-up approaches;

(b) the dynamic wheel of learning formed by the combination of strategic information, learning, consultancy/guidance and support;

(c) the dynamic wheel of labour factors for competitiveness: the improvement of competitiveness taking into account the labour environment, organisational structures and competences for transforming knowledge in innovation.

The idea of learning area should be supported by all stakeholders concerned (building partnerships) but the Public Authorities could play a critical role for its implementation through political and economic support, as well as playing a steering role between the complex partnerships required in the learning areas. The leader of the learning area must act in a very fair manner for the benefit of all concerned and through on effective and meaningful cooperative and integrated process. The stakeholders should have clearly defined roles and commitment in order to achieve a capable partnership.

Learning centres/agencies (all types of learning providers) could have a key role for implementing the learning area in a sustainable way, acting as a leader and becoming the area's core. Physical learning structures close to the industry and supported by all stakeholders would be a prerequisite. Those learning centres must support and/or enhance the holistic provision of learning for coping with the real needs of the area, acting as the most important propeller of the 'dynamic wheel of learning' in close cooperation with the other stakeholders. Implementing 'Circles/workshops of innovation' in the centre as a way of exchanging knowledge between enterprises, professional and R&D organisations could be appropriate. 'Learning centres' should enhance innovation in the local economy, being the bridge between R&D organisations and the real enterprises' needs: real broker for innovation and development.

In order to be able to cope with the real needs of the local economy, it is necessary that learning centres be flexible, adaptable, very close to the enterprises and professionals, cooperative, building partnerships with all stakeholders concerned, acting as leader and involved in the local development process. It is also important to transmit the philosophy of learning areas to the local society.

In this paper the role of learning centres as a central point for developing, implementing and driving the concept of learning area has been stressed due to the specific subject of the Agora. Nevertheless, learning area should be adapted to the peculiarity of each area, it being necessary to reflect in each case the key issues stressed in this contribution:

(a) the stakeholders involved and who is acting as a leader;

(b) the main target groups;

(c) the main challenges and activities in the area;

(d) the need or not for physical structures;

(e) who must be directly be involved in the provision of the holistic learning approach,

(f) ways to finance the activities.

Those ideas are critical for implementing the concept of learning area in the tourist sector due to its intrinsic nature: complex sector/product, service (direct contact between producer and buyer), flows of tourists, bad image of some subsectors of tourism, peculiar labour environment, seasonality, etc. The competitiveness of the local tourist destinations is a challenge of coordination between a large group of entities. Therefore, if the tourism sector is to be competitive, knowledge and cooperation is necessary. For the same reason the tourist sector has been identified as a very good test-bed for developing and implementing innovative ideas and concepts.

Annex 1: Mandate of working group B ([50])

Having regard to the conclusions and recommendations of the HLG on Tourism and Employment, and to the proposals in Commission Communication [COM (1999) 205 final] to:

(a) identify the main training needs of the different stakeholders in tourism, especially workers and managers of SMEs, the principal obstacles encountered in upgrading their skills, and future requirements;

(b) identify strategies and measures at national, regional and local level (including instruments, innovative solutions, etc.), designed to upgrade skills in the tourism industry;

(c) assessment of existing contribution and potential of relevant Community policies and programmes;

(d) conclusions and recommendations, including scope for greater cooperation between authorities concerned, and for better use of Community instruments and programmes.

([50]) Mandate agreed in the Tourism Advisory Committee of 1st January 2000 for following up the Council Conclusions (Internal Market) of 21 June 1999 on Tourism and Employment.

Annex 2: List of experts of working group B

Chairman of the WGB's meetings:	Mr Reinhard Klein, Head of the Tourism Unit. European Commission. DG Enterprise.
Coordinator WGB:	Mr Vicente J. Molés Molés. European Commission. DG Enterprise. Tourism Unit
Rapporteur WGB:	Mr Jens Friis Jensen, Expert of Denmark.

MS	EXPERT	ORGANISATION
B	Mr. Piet Jonckers	Toerisme Vlaanderen
DK	Mr Jens Friis Jensen, Development Manager	The Billetkontoret A/S
D	Mr Friedrich Fehling	Referat IIB7-Bundesministerium für Wirtschaft & Technologie
	Mr Hans Doldi, Vice President	Deutscher Reisebüro Und Reiseveranstalter Verband e.V. (DRV)
GR	Mrs Ekaterini Demoeliopoulou	Tourism Training Schools
	Mr Anastassios Vassilopoulus Member of the Administrative Board	Schools of Tourism Education
E	D. Javier Díez-Miguel Jefe de Área de Planes/ Formación Empresarial	Dirección General de Turismo
F	Mme Lydie Sorel Chargée de mission 'Emploi-Formation'	Délégatión générale du tourisme Provence-Côte d'Azur
IRL	Ms Anna Carroll Head of Education, Placement and Research	CERT
I	Dott. Alfredo Tamborlini Director General	Istituto per lo Sviluppo della Direttore Generale Formazione Professionale deiLavoratori (ISFOL)
	Mr Mario Gatti	ISFOL
	Mr Stefano Poeta	Ministerio dell'Industria del Comercio e dell'Artigianato
L	Mr Philippart Robert	Office National du Tourisme
NL	Mr Paul H. van Gessel Deputy Head of the Strategy	Development and Research Division NBT (Nederlands Bureau voor Toerisme)
A	Dr. Klaus Ennemoser	Wirtschaftsberatung
P	Dr Carlos Costa	Universidade de Aveiro – Departamento de Gestão Industrial
	Dr Acácio Duarte	Centro Escolar Turístico e Hoteleiro do Estoril
SF	Ms. Tuula Rintala-Gardin, Managing Director	Centre of Expertise in Experience Industry of Lapland
S	Ms Agneta Florin, Managing Director	Swedish Travel and Tourist Industry Federation, RTS
UK	Ms Diana James	Wales Tourist Board

TOURISM INDUSTRY'S STAKEHOLDERS (SINCE JANUARY 2001)

ATLAS	Mr Greg Richards	Department of Leisure Studies- Tilburg University
Europarks	Mr Jeff Bertus, Owner/director	Jeff Bertus Leisure
HOTREC	Ms Katia K.Ostergaard, Head of Department of Social Affairs	Horesta
EFAFT-FEAAT	Mr Christian Juyaux, Délégué Général	SETA-UITA – Accueil et Services
FoNI	Mr Christian Baumgartner	Friends of Nature International
EUROCHAMBRES	Mr Daniel Guiraud, Chef du Service Europe	Entiore, Cité de l'Entreprise

Other services of the European Commission and European Agencies.

European Commission	Ms Gertraud Loewen	DG Employment and Social Affairs
European Commission	Ms Silvia Scatizzi	DG Internal Market
European Commission	Ms Ariane Debyser	DG Enterprise
Cedefop	Mr Stavros Stavrou – Deputy Director	
Cedefop	Mr Iver Jan Leren – Project manager	

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Annex 3: Main factors affecting tourism and learning needs

Factors which could affect learning in the Tourist industry (distilled from the Country Reports – not listed in order of priority)			
1. Employment vacancies 2. Staff turnover 3. Staff recruitment and retention 4. Seasonality 5. Employment of foreign nationals 6. Work conditions. 7. Financial resources.	8. Poor perception and image of tourism 9. Career perspectives. 10. Labour shortage. 11. Skills gaps. 12. There is not a high level of off-the-job training of staff. 13. Relevance of qualifications 14. Low level of education of the workforce. 15. Wage inflation 16. Productivity.	17. Technology. 18. Industry complexity. 19. Limited size of the enterprise 20. Lack of specialist trainers with experience in the sector. 21. Poor quality training and overproduction of candidates/ diplomas 22. Fierce competition	23. Changes in organisational culture and the evolution of the nature of work 24. Motivation behind access to tourism as a job 25. Globalised tourism markets and evolution of the nature of demand for services 26. Vertical and horizontal integration processes

Source: Interim report of WGB. September 2000.

Learning needs on the Tourist sector by labour categories				
All categories	**Managers**	**Supervisors**	**Skilled craft workforce**	**Semi-skilled**
	(Training needs all categories +)	(Training needs all categories +)	(Training needs all categories +)	(Training needs all categories +)
- Tourism - New technologies - Quality - Customer Care - Reception skills - Communications - Languages - CrossCultural understanding - Team work - Project work - Sustainable development - Entrepreneurship - Safety and security within tourism enterprises - First Aid	- Computer skills - Business Planning/ strategic planning - Strategic Alliances - Management Skills - Management through vision and values - Yield Management - Accounting - Product development, innovation - Marketing - Sales - Human Resource Management - Destination management - Project management - Management skills to cope with the globalisation reality - Train the Trainer - Change Management	- Basic Computer skills - Human Resource Management - Hygiene - Accounting - Supervision skills - Training skills	- Personal skills - Problem solving - Basic computer skills - Induction training	- Personal skills - Technical skills (bar, kitchen, restaurant, cleaning.) - In-house-training - House-keeping training - Induction training

Source: Interim report of WGB. September 2000.

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12. Summary of discussions: promoting the learning region – education and training agencies taking a leading role in promoting innovation on a regional basis

Barry Nyhan

12.1. Introduction

The Agora Thessaloniki XI dealing with the topic 'Promoting the learning region – education and training agencies taking a leading role in promoting innovation on a regional basis' took place at Thessaloniki from 15 to16 March 2001. This paper gives an account of the interventions and debate at the Agora. The first part is based mainly on the background papers produced and presentations made by Cedefop staff ([51]) at the opening of the Agora. The second part of this paper gives a summary overview of the different presentations made by the invited experts from many different backgrounds and countries who contributed to the Agora debate.

12.2. The concept of the learning region

12.2.1. Why learning regions

The concept of the learning region has come into being in recent times in response to the challenge of economic and social innovation. In addressing the question – why is it that some societies are able to develop and change while others lay stagnant – the phenomenon of the learning region is put forward as a factor to be considered. In the first place, this implies that certain societies are able to innovate because they have the capacity for collective learning about how to develop new knowledge and in particular a practical know-how type of knowledge. Secondly, the term 'learning region' implies that this collective learning for innovation takes place better in small, more contained social units – such as regions, localities

([51]) In early 2000 Cedefop published a book entitled 'Towards the learning region – Education and Regional Innovation in the European Union and the United States' as a contribution towards the stimulation of debate on this topic. Around the same time Cedefop, in the context of the Cedefop Research Arena (Cedra), commissioned the Department of Work Sciences of Halmstad University in Sweden to produce an analysis of international research on 'regional approaches to learning in the field of vocational education and training'. To view this report see www.trainingvillage.gr/etv/cedra/ under thematic knowledge development – work environment – work in progress.

or cities – where people have the opportunities to live and interact and cooperate with each other in an immediate way.

Despite the emphasis on globalisation and the prediction of the demise of place and distance, due in part, to advances in internet technologies, the region or locality is continuing to assert itself as a focal point for the renewal and sustenance of social and economic life. In the context of EU policy to promote economic and social cohesion, the actions undertaken at a regional level, for example, have been very successful. Due to their smaller scale, regions can better coordinate their planning efforts and be more flexible than larger national entities in coming up with new solutions to address everyday problems. The possibility of close personal contacts along with the feeling of a communal identity and a shared history can generate commitment to work hard on a local level, building what is termed 'social capital', which is not always the case on a national level.

But, this is not to exaggerate the advantages of regions nor oversimplify the task of promoting economic and social advancement. Regions and localities can indeed be inward looking and conservative. Power within regions can also be held by cliques which manipulate affairs for their own purposes and resist necessary national-level reforms. Also, some economically well-off regions can be isolationalist, thinking only of their own self-interest and not taking responsibility for broader national social and economic issues, nor engage with those outside of their own boundaries.

However, even within regions which are open to innovation, progress can only take place if there are forward looking institutions and individuals who take the lead in coming up with ideas and facilitating cooperation between all of the actors throughout a region, thus raising the question of what education and training agencies can do in this regard.

The importance assigned to the notion of the learning region can be seen if one casts a glance at the titles of recent OECD publications, such as: 'Learning how to innovate – the role of social capital' (2001); 'Cities and regions in the new learning economy' (2001); 'Economic and cultural transitions towards the learning city – the case of Jena' (1999); 'Regional competitiveness and skills' (1997); 'Learning how to innovate – knowledge regions' (2001). The Cedefop publication 'Towards the learning region – education and innovation in the European Union and the United States' (2000), editors Nyhan, B., Attwell, G. and Deitmer, L., examines the issue of the learning region from the point of view of the renewal of the education and training sector.

12.2.2. Distinctive feature of a learning region

The distinctive feature of a learning region is: the cooperation between different actors – such as educational bodies, research and development agencies, statutory bodies, enterprises and non-governmental organisations (civil society) – in learning together how to devise solutions and produce new knowledge to address local needs. A learning region is harnessing knowledge and expertise from disparate sources for the achievement of a common goal

In the concept of the learning region being put forward here, the focus is on achieving social and economic objectives in an integrated manner. Regional learning initiatives entail empowering local communities (through the involvement of people from different interest groups) to enhance their living standards and quality of life, both from economic and social points of view. The learning which characterises a learning region is focused on implementing common actions. It is 'collective learning by doing'. The learning methodology used is interactive in the sense that institutions teach and learn from each other. Much of this learning can be described as informal social learning.

The word 'region'

It is important to note that the word 'region' in the learning region sense is to be interpreted in a very broad way to refer to a geographical area or locality (which can sometimes be quite small) whose inhabitants share common objectives or problems. This does not have to be a statutory regional entity, nor does it necessarily have to have regulated or defined political boundaries. The manner in which a learning region goes about its business tends to be along self-regulating, self-learning, networking and horizontal lines.

In very many cases learning regions may refer to small scale communities, localities, towns or villages involved in collaborative learning activities. The important feature is that development is a collective process to produce an outcome that is in the interest of all concerned and in which top-down and bottom-up developments form a dialectic. Successful partnerships, therefore, reflect local circumstances, are not imposed and do not follow a standard model.

Task-focused and interactive learning

As already mentioned above, learning in the learning region is task-based with the focus on the resolution of a local problem. This entails the use of, what is termed 'activity-learning theory' methods (see the work of the Finnish learning theorist Engeström, 1987). This can also be referred to as 'action-learning'.

The word 'learning' in the term 'learning region' of course raises the question of the role of education and training agencies in the promotion of learning in a regional context and how they might act as catalysts or as active partners with others in this respect. Traditionally, education and training establishments see their main role as being providers of teaching and training (learning) to individuals who, on graduation join other bodies (enterprises, public or community agencies, etc.) to utilise their learning. This can be referred to as a linear way of thinking about learning and is typical of formal learning in initial education and training. Another way of looking at the learning process, which is not so prevalent, but is at the heart of the thinking about the learning region, is that which can be called 'interactive learning'. This refers to social and organisational learning that arises in the course of cooperation between different bodies and interest groups – such as technological and social research/ development agencies, educational institutes, companies, social partners, community bodies (civil society)

– working together in project teams or in dynamic networks to achieve a common goal. In line with this model, learning gives rise to a community way of behaving and know-how – 'communities of practice' (Wenger, 1998; Brown and Duguid, 1991). It is this type of cooperative learning, much of it informal and project based (often addressing specific problems), rather than the formal type of learning described above that is at the heart of the 'learning region' concept.

From an educational and training point of view the two goals of learning, mentioned above, that is the individual formal learning activities and the social/organisational informal learning ones, need to be kept in balance. The 'learning region' concept, however, has more to do with the social/organisational dimension. The emphasis, therefore, is primarily on introducing new social learning methodologies. This entails:

(a) identifying new roles to be played by existing education and training agencies and/or

(b) creating new agencies for the promotion and facilitation of this kind of learning.

Role of the education and training sector in promoting the learning region

The distinctive role to be played by education and training bodies in the learning region is the facilitation and mediation of cooperative learning (in the above sense of task-based, interactive and informal learning) related to a particular task that a community or locality wishes to address. This can entail being a catalyst for the production of new ideas and/or acting as a broker or mediator enabling different groups (public and private agencies, economic and socially oriented bodies) to develop the know-how or to learn how to turn their ideas into reality. This could be, for example, combating unemployment or supporting the start-up of new enterprises.

However, notwithstanding the informal nature of this learning, the consequences of carrying out this moderation and mediation role, and in particular the identification of learning needs, will in many cases give rise to the need for formal learning (education and training courses) to be organised in the traditional sense for people in the locality. These may deal, for example, with business skills, computer skills or social and cultural programmes and in some situations, for example, literacy oriented programmes

Partnerships and networks

However, education and training strategies, which promote regional innovation and development in a learning region context, need to be very different from traditional education strategies. The focus needs to be on cooperative learning not normally associated with the role of education and training agencies. This entails taking a lead in forming partnerships and networks in which the various educational, social and economic agencies transcend their differences and combine forces in agreeing a common action-strategy.

Such partnerships, which have taken the form of consortia in what have been termed the 'industrial districts' in Italy with many other examples also in Germany, Denmark and Belgium, carry out a number of integrated functions such as:

(a) offering guidance in the implementation of new technologies;

(b) addressing problems arising from company growth, and

(c) promoting vocational education and training (competence development).

These partnerships can also act as an interface between the local, European and global contexts.

In the context of initiatives focusing on broader social as well as economic objectives, regional learning initiatives entail empowering local communities through the involvement of people from different interest groups with the view to enhancing their living standards and quality of life. In this regard, development is a collective process in which organisations and individuals with different goals come together to produce an outcome that is in the interest of all concerned. In the same vein, the place of indigenous development and innovation leadership must be taken fully into account, with top-down structural change and bottom-up development forming a dialectic through which local and regional development is bolstered.

Successful partnerships, therefore, reflect local circumstances and are not imposed or developed according to some standard model. Indeed a strong partnership, arrived at through a systematic consensus building process, is one of the most important eligibility criteria for the receipt of funding under the auspices of EU programmes.

The educational agency in the learning region also pays attention to the interdependence of the different branches of knowledge – business, technological, social and human – and attempts to bridge theoretical and practical knowledge. The educational and training sector also adopts an approach of 'going-out' to enterprises, (particularly small and medium sized one) and community groups, and working with them in their own environment on targeted learning approaches which integrate organisational, business and individual development.

Transferring some of the principles derived from the concept of the learning organisation

The experiences of companies which have introduced new management and learning approaches along learning organisation lines, can throw some light on how the principles of the learning region can be implemented. In an effort to achieve greater efficiency, many companies have moved in the direction of flatter organisational structures with autonomous work groups. Learning is embedded in this process, taking place in the problem-solving environment of the workplace. This complements formal learning. The role of the HRD or Training department in this context shifts towards a catalyst role rather than from a direct-training one, assisting the different employees to pool their experiences and thus, through their own efforts, generating new knowledge in 'knowledge creating companies' (See the work of the Japanese authors Nonaka and Takeuchi, 1995).

A new role for universities

Universities (and third level education institutes) have a special role in promoting local innovation. Their involvement in local or community affairs has been referred to as the third role of universities complementing their other two roles of teaching and carrying out research. Many universities are carrying out this function through research and development partnerships with industry, consultancy to SME networks or by means of setting up of science and technology or business parks often in close proximity to the university campus.

12.2.3. Some examples of projects illustrating the 'learning region' concept

An ideal learning region project tackles economic and social goals in an integrated manner. However, most learning region projects tend to focus either on an economic or a social objective.

Economic-oriented partnerships for the development of small enterprises

A regional or local focus can offer a practical cooperation framework for the business development of small enterprises. These enterprises often have problems in many areas including human resource-development. A solution to this has been the creation of partnerships made up private and public interests, including education, consultancy and research services. The focus of these services has been on the integrated implementation of actions related to the following – new technologies, business management and vocational training.

One of the best examples of this can be found in the northern part of Italy (in particular in Emilia-Romagna in Italy). A federation (made up of education and training providers, research institutes, small industry service consultants and companies themselves) has been set to improve regional training systems. For a proper understanding of how this works in northern Italy, one has to place it in the wider context of the establishment of what are called 'industrial districts'. The latter are comprised of clusters of small industries, in the same locality, that cooperate and compete with each other in producing goods for specialised world markets in sectors such as clothing, textiles and footwear (e.g. the textile industrial district centred around the town of Carpi in Emilia Romagna).

Although this spirit of clustering and cooperative competition is created primarily through the entrepreneurship of the owners of the small enterprises, strong support is provided by the local public authorities and the national government, especially with regard to infrastructural, education and training, and research and technological development matters. Indeed the role of local government in mobilising and sustaining the natural talent of the community, rooted in historical, cultural and family ties, is an essential ingredient in the recipe for success. Similar, although less well known, developments along these lines can be found in west Jutland in Denmark, Valles Oriental in Spain, Baden Wurttemberg in Germany, Oyannax and Cholet in France and south-west Flanders in Belgium.

Other examples of cooperation, following different models, can be found in Germany. For example the learning region Chemnitz involves the university, consultancy firms and the chamber of commerce in the support of small enterprises. A qualification network for shared learning was also set up in Lower Saxony to facilitate the introduction of reforms in the apprenticeship system. Examples of a territorial-focused solution to the problems confronting small companies can be found in the Cheylard and Saint-Etienne areas of France. In Austria a 'learning pyramid' model, operating at company, inter-company and regional levels, has been implemented in the region around Graz.

In the Netherlands vocational training institutes have set themselves up as 'regional agents' situating themselves at the crossroads of regional and sectoral policies. They aim to build up the innovation capacity of companies through developing their collective learning capacities. A programme named Skillsnet using many of the partnership notions underlying the 'learning region' concept has been implemented in Ireland. This programme, which is supported by the EU Social Fund, has established 60 networks representing 4 500 companies. The focus is on partnerships between employer and trade union bodies at a local level for the furthering of training and lifelong learning. In one of the conclusions to this report, the point was made that basic partnership activities are also learning experiences. Once this is recognised, it is easy to see that in many cases partnership is learning.

Local initiatives with social objectives

Initiatives dealing with more social objectives have attempted to harness the collective efforts of people from different interest groups with the view to enhancing their living standards and quality of life. The emphasis has been on promoting self-help through empowering local communities. This has entailed experiments in new types of democracy with the close and active participation of the community sector (that is, voluntary groups or non-governmental organisations – NGOs, or what some people refer to as the 'civil society').

This new type of social organisation, based on the notion of partnership, means the decentralisation of authority to representative local groups who have the resources and the autonomy to run programmes. The key to success is the adoption of a pragmatic problem-solving approach through which people set aside their ideological viewpoints to participate in a development partnership.

An issue which is being tackled in this manner in France is that of the integration of young people in the workforce. A territorial approach has provided a context for the integration of employment and training policies. The *mission locales* also in France, while founded on similar principles, are attempting to address more serious social problems, for example those affecting migrants on the outskirts of large urban areas. A programme entitles Building Learning Communities is focusing on the needs of socially disadvantaged young people in the autonomous communities of Catalonia and the Basque Country in Spain. It is felt that learning methodologies based on new dialogue and communication frameworks are necessary in order to achieve lasting transformations.

In Ireland what are called area-based partnerships (ABPs) were created in urban and rural areas to address economic disintegration and its consequences. The organisational structures of these partnerships tend to blur the distinctions between public and private, national and local government, representative democracy and direct participation in public affairs. The ABPs use participatory methodologies and are largely independent of local statutory government. Although they complement local government, they are not obliged to account for themselves to local government. Among the tasks of these partnerships, is the setting up of innovative training projects which are tailor-made to meet local needs.

12.3. The Agora presentations and debates

12.3.1. Session one of the Agora

Following the opening introductory session (see Agora programme), the first session of the Agora was devoted to a discussion on the concept of the learning region and a critique of its strengths and weaknesses.

Mr Thomas Stahl (ISOB, Regensburg, Germany) presented a paper on the relationship between the promotion of innovation and the concept of the learning region. He defined innovativeness as the capacity to influence the future and pointed out that this is at the heart of the learning region notion. He stressed that this must be seen in terms of the different actors in a region co-producing innovation through interfacing and cooperating with each other. Implementing learning regions, therefore, is about providing common spaces for innovation. This entails non-bureaucratic and non-ideological bottom-up strategies through which people, who are confronted with common problems, cooperate in solving them. They do this through setting up 'thinking and doing networks' which allow the different reference groups to interface with each other. Mr Stahl concluded by pointing out that this bottom-up approach has to be supported by and integrated with top-down government policies.

Mr Antoine Richard (CEREQ, France) pointed out that the 'learning region' concept raises a number of critical questions concerning the relationship between civil society and political society. There are clearly difficulties in reconciling the voluntarism characteristics of the 'learning region' concept with the legitimised political roles to be played by elected community representatives on the local and national levels. There is therefore a need for clear and coherent relationship to be established between the leading actors at the local and supra-local and supra-regional levels. From an education and training point of view it is important to establish coherent referentials regarding diplomas and certification systems between the local and national levels. Mr Richard closed his presentation by issuing a challenge to the education and training establishment to begin to address 'collective' community goals and not just the educational needs of individuals. He also stressed that the 'learning region' concept must not just be evaluated from an economic point of view but that social perspectives must also be taken into consideration.

In the round table discussion following these two presentations Mr Nikolaus Bley (DGB – Bildungswerk, Nordheim-Westfalen, Germany) pointed out the 'learning region' concept should be interpreted in a flexible manner and that a learning region is an area that calls itself such – this can be a state, a city or a locality. The central goal of getting people to work together on the projects that they have decided to work on, should be stressed. The main thing is to find agreement on objectives and leave the manner of implementation up to the people themselves. In the Netherlands they refer to this approach as 'soft guidance' from the national government.

Mr Johan Stålhammer (Swedish Education Ministry) stressed the need for regional leaders to gain the commitment of all of the different interest groups. It is also important to address economic and social objectives in an integrated manner. Mr Edward Tersmette (European Commission, DG Education and Culture) pointed out that local public authorities need to carry out audits of learning needs which could form the basis for a benchmarking system. He also emphasised the importance of identifying locations for learning that are outside of the formal school system.

In the open discussion following this round table, Mr Björn Gustavson (Swedish National Institute for Working Life, Stockholm, Sweden) made the point that the learning region notion must not become an abstract theoretical economic concept but must be rooted in bottom-up pragmatic activities. A number of other participants took up this point in stating that it is a question of harnessing local initiatives and not a question of applying a generalised theory. From a conceptual point of view the learning region can be seen as a framework for understanding the connectedness between the different economic, social and cultural activities taking place in a locality.

Mr Vangelis Intzidis (Consultant, General Secretariat from Adult Education – Ministry of Education and Religion Affairs, Greece) asserted that there cannot be any unitary definition of a learning region as it is a hybrid concept promoting multi-faceted cooperation to enable citizens to express themselves.

12.3.2. Second session of the Agora

The second session of the Agora was devoted to discussions on how education and training agencies (including research and development centres) can promote innovation in a regional/local context.

Mr Björn Gustavson presented a paper on the principles to be followed in implementing a bottom-up 'learning region' approach. He spoke about the limitations of classical top-down government strategies. In relying mainly on a top-down approach, central government initiatives often tend to have short-term effects and achieve their results by accident rather than design. He was also critical of the very common approach to economic and social innovation that is based on the establishment of model or star projects (or case studies) which are then used as a kind of template for wide spread replication. He favoured a development

approach in which people worked together and learned from each other in building their own models or cases based on their own unique needs. This requires a horizontal mobilisation approach. The learning region can be seen as a space within which people match and adapt what comes from above (from government) to meet needs defined from below.

Mr Tony Crooks (Irish Area Development Management Programme) described a social partnership strategy that attempts to combine horizontal bottom-up initiatives with vertical top-down governmental policies and actions. The national government-funded body is responsible for bringing people together in partnerships to develop a shared vision for the development of an area and the people who live in it. This involves an identification of the social and economic needs of the area, an analysis of these needs, agreement on a set of objectives and on a strategy to achieve the objectives. This entails negotiation and agreement leading to collective decision-making, which in turn leads to joint ownership of the decisions. For many people, used to hierarchical structured situations, this is a new learning experience. Many of the issues to be addressed in disadvantaged urban and rural areas are multi-dimensional in nature. They can only be solved by cooperation between different agencies and different partners who work together in an integrated way. To achieve this it is necessary to adopt a collaborative learning approach, which is a characteristic of the learning region.

Mr Bernd Hofmaier, Halmsted University, Sweden, gave an account of the development of 'learning region' thinking in Sweden. He pointed out that previously, when regions were discussed, the emphasis was usually on the region as a political unit and often with emphasis on cultural elements. But, more recently another element has emerged – namely the notion that regions can be seen as innovation systems. In characterising a region as an innovation system, one is referring to the models of interaction between knowledge producers, disseminators and users. This structure is characterised by extensive interaction and iterative communication. Exchange is normally done more or less informally, but can also be organised according to a certain methodology. New ideas about how to support companies in a learning region context came through development programmes that have experimented with methodologies such as democratic dialogue based on a theory of communicative competence and clusters and networks consisting of enterprises and academic institutions.

Mr Claudio Dondi (Scienter, Bologna) spoke about a major regional reform initiative undertaken by the Department of Employment, Education and Training of the Regional Administration in the Emilia-Romagne region in Italy aiming to:

(a) improve the capacity of the training system to respond in an effective and flexible manner to needs of actors in the local economy; and

(b) promote a federation of regional education and training providers linking them with research institutions and enterprises in the direct provision of training.

This project is of interest from the following points of view:

(a) its integration in regional development policies, its strategic orientation combined with its bottom-up approach;

(b) the level of involvement of different local actors in a common effort to provide information, training and advice to SMEs;

(c) the role assigned to enterprises in the design and provision of training;

(d) the transnational cooperation model, which generates significant outputs and a shared learning culture among all actors involved in the regions of the twelve partners.

Mr Bernd Baumgartl (Navreme, Consultantcy and Research, Austria) presented an overview of development in the Balkans area in south-eastern Europe. The key issue being addressed in the changing regional constellation, is the relationship between citizenship, governance and the development of competence. He illustrated his presentation by referring to the experiences of three case studies in Istria (Slovenia/Italy/Croatia), Suceava (Romania) and FYROM (Former Yugoslavian Republic of Macedonia).

Some of the central challenges being faced are:

(a) developing a new role for public bodies to rally people into action; and

(b) combating a overly strong emphasis on ethnic identity as a basis for regional identity.

Mr Tzako Pantaleev (Director of Human Resource Development Centre, Bulgaria) spoke about the EU-funded programmes for regional development based on education and training in Bulgaria. A key issue being addressed is to identify how learning and not just training, contributes to the development and upgrading of the human assets of the region/community. This relates to finding ways to enable existing knowledge or the knowledge generated in the institution dealing with research and training in different parts of the region, to become accessible to others. Key challenges being faced relate to a) enabling communities and partners to develop systems and programmes to promote network-based learning; b) to create a culture of lifelong learning; c) to understand how intellectual capital is fostered; and d) to drew on the lessons learned from experience regarding future actions.

Mr Pierre Courbebaisse (General Director of the Association for Continuing Education and Training – AFEC, France) spoke about how regionalisation policies in France allow for direct democracy. This provides a framework for individuals and not just institutions to be consulted about what they want. He also stressed the need to renew ways in which the social partners could be involved in local decision-making about education and training policies.

12.3.3. Third session of the Agora

The third session of the Agora was devoted to a discussion on education and training and the social economy in a regional context.

Three speakers addressed the question of how education and training can assist in the development of the social economy. Sven-Åge Westphalen (Copenhagen Centre, Denmark) presented a short paper on the European social economy and the emergence of new social partnerships and learning regions. He pointed out that the merger of the social with the economic is not only a technical matter of finding appropriate solutions to complex problems, but at the European level and nationally there is an increasing focus on how to balance economic competitiveness and social cohesion. Specific approaches to more efficiently addressing socioeconomic challenges in the crossroad of social and economical, demand and supply, often include the establishment of what are called public-private partnerships, new social partnerships or corporate governance. It is within this overall framework of partnerships that learning regions unfold.

Nationally, governments have given area-based partnerships a wide and complex agenda in recent years as a means of addressing economic and social questions. These new alliances represent an important source of innovation at the local, practical and policymaking levels. New social partnerships are formed around a broad range of socioeconomic elements including, but not limited to, labour market issues. Employment and the inclusion of weaker groups into the labour market are important areas but also education and training initiatives are increasingly formed around broad learning partnerships.

Mr Eduardo Figueira (University of Évora, Portugal) gave an account of a local development movement (LDM) in the Alentejo region of Portugal. In facing their economic and social problems, people in the LDM have been trying to take their own destiny in their hands. A Local Development Movement (LDM) has been generated in the Alentejo region, and from it several Local Development Associations (non-profit entities) have been created. To support this movement the ALIENDE *(Associação para Desenvolvimento Local)* has been set up to promote sustainable and integrated local development as a strategy to combat the rural depopulation and social exclusion in the Évora District. Its working philosophy is supported by the conviction that development is an abstraction, which can only be concretised by a local development process based on five principles:

(a) The local (territory) should be seen and read as The Centre of the Universe.

(b) Participation and cooperation of all local actors (individuals and organisations) constitute a *sine qua non* condition for the success of any local development process.

(c) Integration of all sectors of activity generates dynamics and synergy essential for the local development process.

(d) The local development process must have a local management.

In order to reach the proposed aims, ALIENDE has defined the following priorities:

(a) Developing human resources of the area/territory.

(b) Promoting and developing entrepreneurship and enterprise activity, including tourism and handicraft activities.

(c) Protecting and valorising the local culture, the natural environment and heritage.

(d) Animating socio-cultural activities.

(e) Giving support to groups and individuals suffering socioeconomic difficulties.

Ms Sylvie Grucker (URSIEA, Alsace, France) made a presentation of the work undertaken by the Alsatian Regional Union for the Integration of People in the Labour market by means of Participation in Economic (work-based) activities. While primarily having economic and commercial objectives, special enterprises – called *entreprises d'insertion* – follow standard commercial market conditions and regulations but also play a social/educational role. Their actions enable very disadvantaged people to gain entry into employment. In this manner the employees/learners gain an induction into working life which enables them to acquire the competence to gain regular employment when they have left these special enterprises.

12.3.4. Final round table/ summing-up session

In the final summing up session a number of people made interventions.

Mr Bernd Hofmaier stated that the key principle underlying the 'learning region' concept is that of connectedness, building interaction and relations between the different actors in a locality who are confronted with common problems/challenges. The learning region can be described as a tight woven fabric with a city being a good example of this. However, there is no single model of a learning region. A variety of approaches must be favoured with implementation driven by differences. However, Claudio Dondi stressed that one of the problems in implementing a multiplicity of approaches is integrating the role of formal policy-makers, or else, one is faced with a problem of political legitimacy.

Mr Vincent Molés (European Commission, DG Enterprise) stated that the idea of learning areas should be supported by all stakeholders but the public authorities also play a critical role in providing political and economic support and have a steering role in the partnerships. Learning centres/agencies are necessary for the sustainability of learning areas. They provide a platform for formal and informal ways of consulting and exchanging information between the stakeholders.

Learning centres should enhance the innovation in the local economy, being the bridge between R&D organisations and the needs of enterprises. Implementing circles of innovation is a way of exchanging knowledge between enterprises, professional and R&D organisations. Involving the stakeholders in the learning centre and transmitting the feeling that they form part of that project is critical. In order to be able to cope with the real needs of the local economy, it is necessary that the learning centres be flexible, adaptable, very close to the enterprises and build partnerships with all stakeholders. An efficient chairperson is essential for developing and implementing the 'learning area' process.

Mr Nikolaus Bley stated that trade unions need to be pragmatic in their involvement in education and training so as to focus on meeting people's 'real' economic and social needs. He

appealed for 'leaving behind the burden of ideology' in facing the challenges and pressures brought on by globalisation. He cited examples of schools in North Rhine Westphalen in Germany, to show that old institutions can indeed change to meet the new challenges.

Mr Vangelis Intzidis summarised his reflections on the topic of the Agora in stating that 'innovation cannot follow pre-defined procedures, because it is not then innovation'. In this regard the learning region must be seen as a 'hybrid concept' in promoting dialogue and cooperation between actors with different interests. In concluding that we must avoid polarising the cultural and working-life dimensions of society, he stated that in order to meet the challenges of the future in creating new 'hybrid realities', such as learning regions, we need a new language and a new grammar.

12.4. Concluding remarks

A feature of this Agora was the balanced mix of contributions from practitioners, researchers and policy-makers, with all of them focusing on how a 'new idea' such as the learning region can change peoples' lives for the better.

Clearly, at the beginning of the Agora, people had different ideas about what constituted a learning region. At the end of the event, they had perhaps become aware that there is no one 'correct' concept of a learning region and that there are no 'star' case studies that can demonstrate how learning regions are implemented in practice. Rather, learning regions have to be seen in the context within which one is living. The key to finding agreement among the different actors in a region is in addressing local economic and social problems in a way that the interests of all are met. While this can be informed by theoretical concepts and images, it is fundamentally a non-ideological and pragmatic exercise. Hence, the key words used by many of the speakers and contributions were – 'bottom-up approach', 'forming partnership', establishing networks, etc.

The 'learning region' approach also entails the use of the word 'learning' in a different way to which it is usually used. This learning is about social interactive and informal learning rather that formal instructionist learning. It is about people collectively learning to understand the causes of their problems and to develop the confidence and the competence to do something about them.

Whereas the educational and training authorities are mainly addressing learning in the formal academic context, and this will likely continue to be their main role, the goal of lifelong learning can only be attained if education and training bodies become catalysts and promoters of social interactive learning in the community. This involves working in untidy learning situations or as Engestrom (1987) would call them 'activity systems' in which the political, business, economic, social and cultural actors have different needs and objectives. Perhaps the key challenge for education and training agencies in furthering learning regions is to be catalysts for people to work and learn together for the benefit of all.

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The region or local area is too often felt to be the focus of every kind of conservatism, folklore and vote-catching. At this Agora, we questioned this image of the region and re-examined and redefined what was actually meant by region.

The region, in our notion of the learning region, has a variable geometry. It has more to do with what we could call the 'local level' than with the administrative notion of the region. The region is defined by sets of partners and institutions which try to work together locally for the economic and social development of its inhabitants. The region is defined more by the fabric of links which are established there and by collectively agreed projects than by its purely geographical frontiers. It must nevertheless continue to have a human dimension: the citizens' day-to-day problems must always be kept in sight. The role of the region, redefined in this way, as a driving force behind the promotion of social, educational and occupational innovation was highlighted and illustrated in detail.

This Agora nevertheless also took pains to stress that local powers needed to be counterbalanced by national or supranational powers. This will allow a degree of balance between the resources and endeavours of regions with differing natural and human assets. The aim is to ensure overall cohesion, rising above local temptations and deceptions.

AGORA XI
The learning region

Thessaloniki, 15 to 16 March 2001

PANORAMA

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